MySchoolBucks

Parent Training Guide

Table of Contents

MySchoolBucks Support Training Guide 4

Creating a Parent Account in MySchoolBucks 5

Adding a Student 6

Adding a Student on a New Account 6

Adding a Student to an Existing Account 10

Parent Resources 11

User Profile 11

Email Preferences 13

Downloads 14

Meal Accounts 14

Cafeteria Meal History 15

Make a Payment 16

Recent Payments History 18

My Order History 20

FAQ and Contacting Support 21

MySchoolBucks Support 22

District and User Searching 22

District Setup 24

Manage Users: 24

District Settings 27

Membership Options 28

Payment Options 29

Payment Gateways 29

Manage Payment Methods 31

Manage Providers 32

Manage Balance Accounts....32
Manage Schools....33
Manage Sites....34
Manage Students....34
Purchase Options....35
Manage Stores....36
Reports....38
Payment Reports....38
Daily Batch Reports:....41
Deposit Reconciliation Report....44
Recent Data Transfers....46
Identifying Parent Account Issues....47
Student record missing enrollment information....47
Unapplied Prepayments:....48
No Email Notification:....49
Scheduled Payment Failure:....50
Support....51

MySchoolBucks Support Training Guide

MySchoolBucks is an award-winning service offered by Heartland Payment Systems, Inc. Heartland Payment Systems is known for fair, fully disclosed pricing and empowering our customers to take control of their payment processing costs.

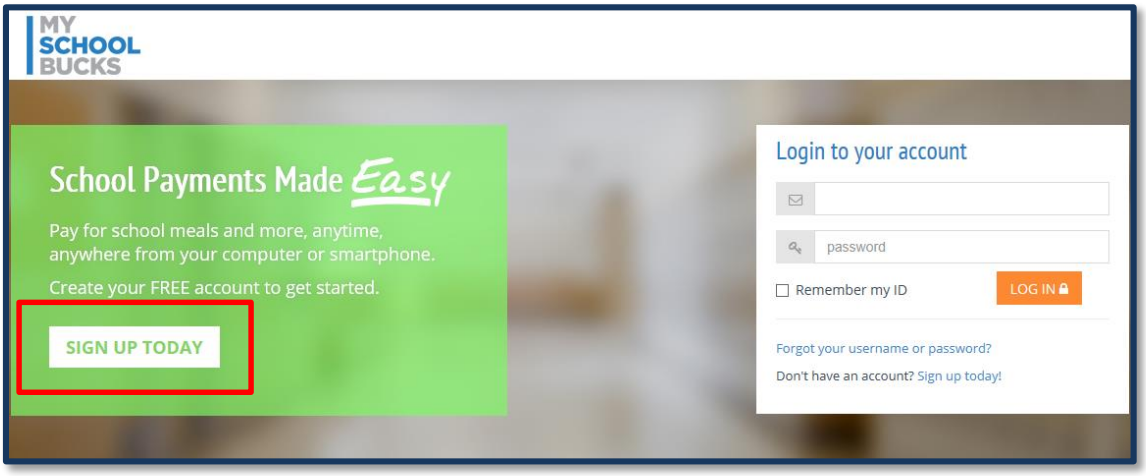
Since being introduced a number of years ago, MySchoolBucks has become the product of choice for thousands of schools throughout the United States. Whether paying for chemistry lab fees, purchasing books, buying athletic tickets, or simply paying for school lunch, MySchoolBucks gives parents the peace of mind when it comes to their children's school purchases.

With MySchoolBucks, parents are able to register for an account and view information for free. Parents are also able to view account balances or recent purchases in the school cafeteria, add money to their student's account, and set up low balance alerts through this award-winning, parent friendly system.

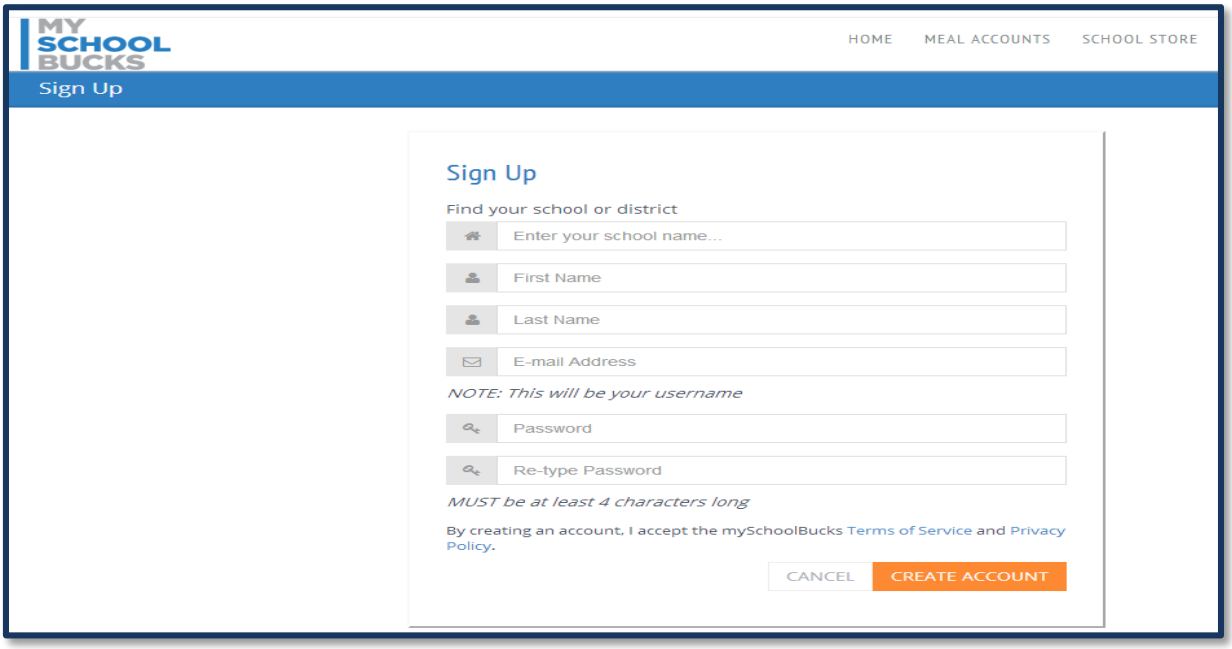
MySchoolBucks is equally impressive to school districts. By providing seamless integration and powerful yet easy-to-use reports, school district administrators are able to focus on education while we focus on providing a safe, secure service.

Creating a Parent Account in MySchoolBucks

All new parent users must click **SIGN UP TODAY** and follow the on-screen instructions to establish their account.


MY SCHOOL BUCKS
School Payments Made Easy
Pay for school meals and more, anytime, anywhere from your computer or smartphone.
Create your FREE account to get started.
SIGN UP TODAY
Login to your account
password
Remember my ID
LOG IN
Forgot your username or password?
Don't have an account? Sign up today!

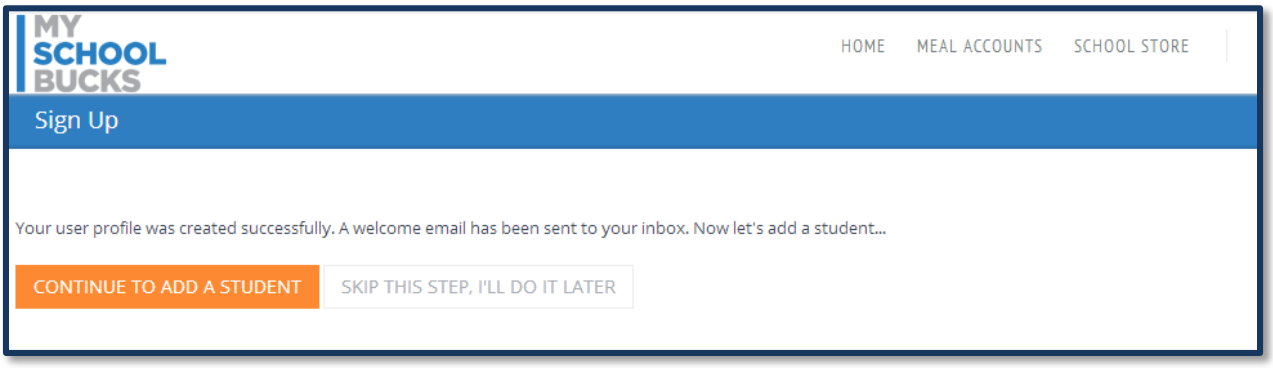
The registration process will require parents to select the District or School in which their students attend, the parent's first and last name, email address, and password. Their email address will be their username when logging in. Once all information is entered, they click the **CREATE ACCOUNT**. A welcome email will be sent to the email address confirming that their profile was created successfully.



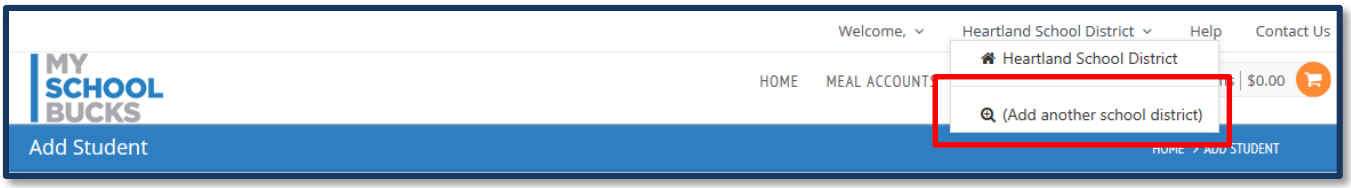
Adding a Student

Adding a Student on a New Account

After creating their account, the user will then have an opportunity to add a student. They can choose to skip this step until a later time.

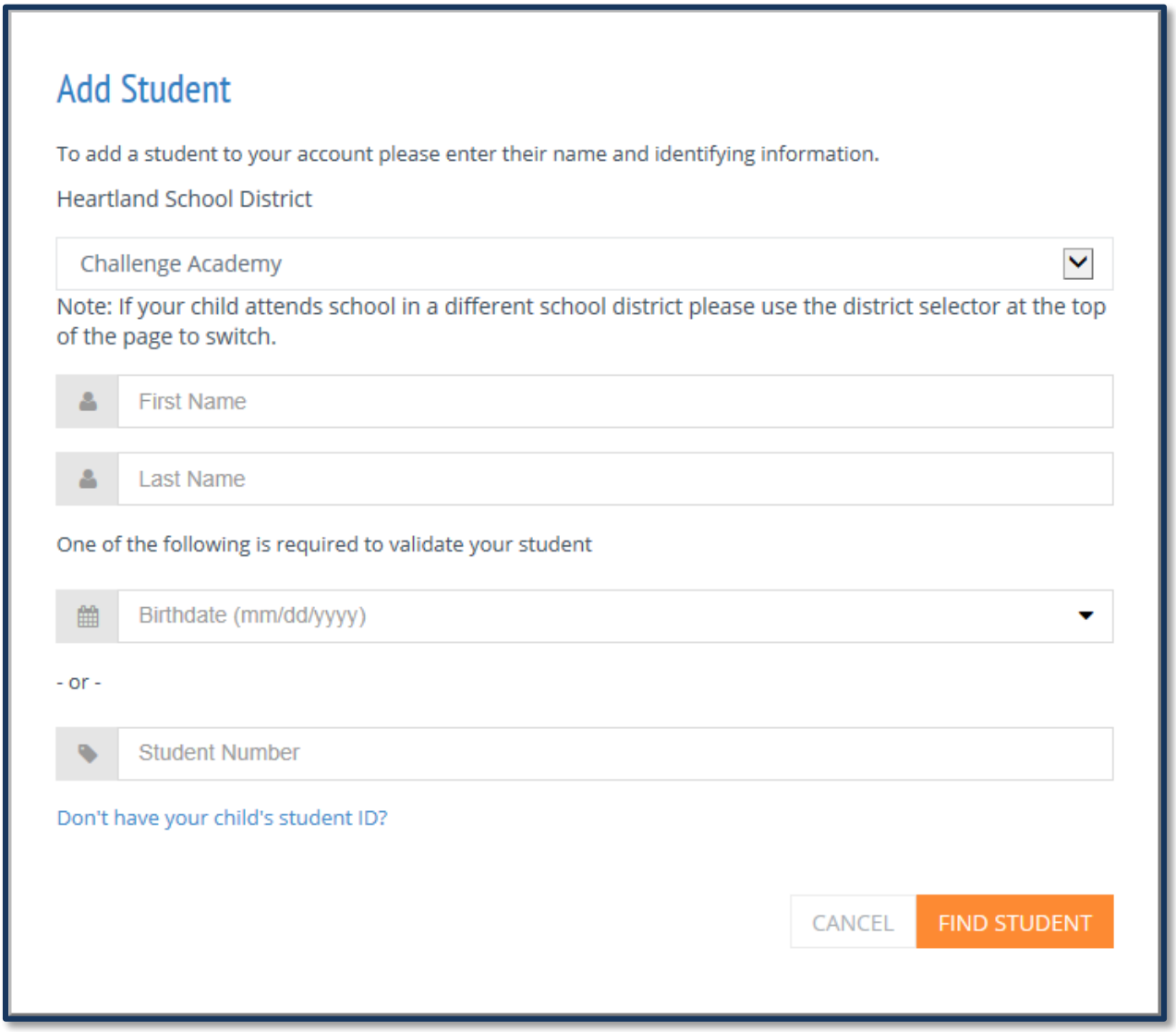

MY SCHOOL BUCKS
HOME
MEAL ACCOUNTS
SCHOOL STORE
Sign Up
Your user profile was created successfully. A welcome email has been sent to your inbox. Now let's add a student...
CONTINUE TO ADD A STUDENT
SKIP THIS STEP, I'LL DO IT LATER

The student's school will automatically be populated, but if an error was made, they can hit the down arrow and select the correct school. If a new District needs to be added, click the down arrow at the top of the screen to add the new district.

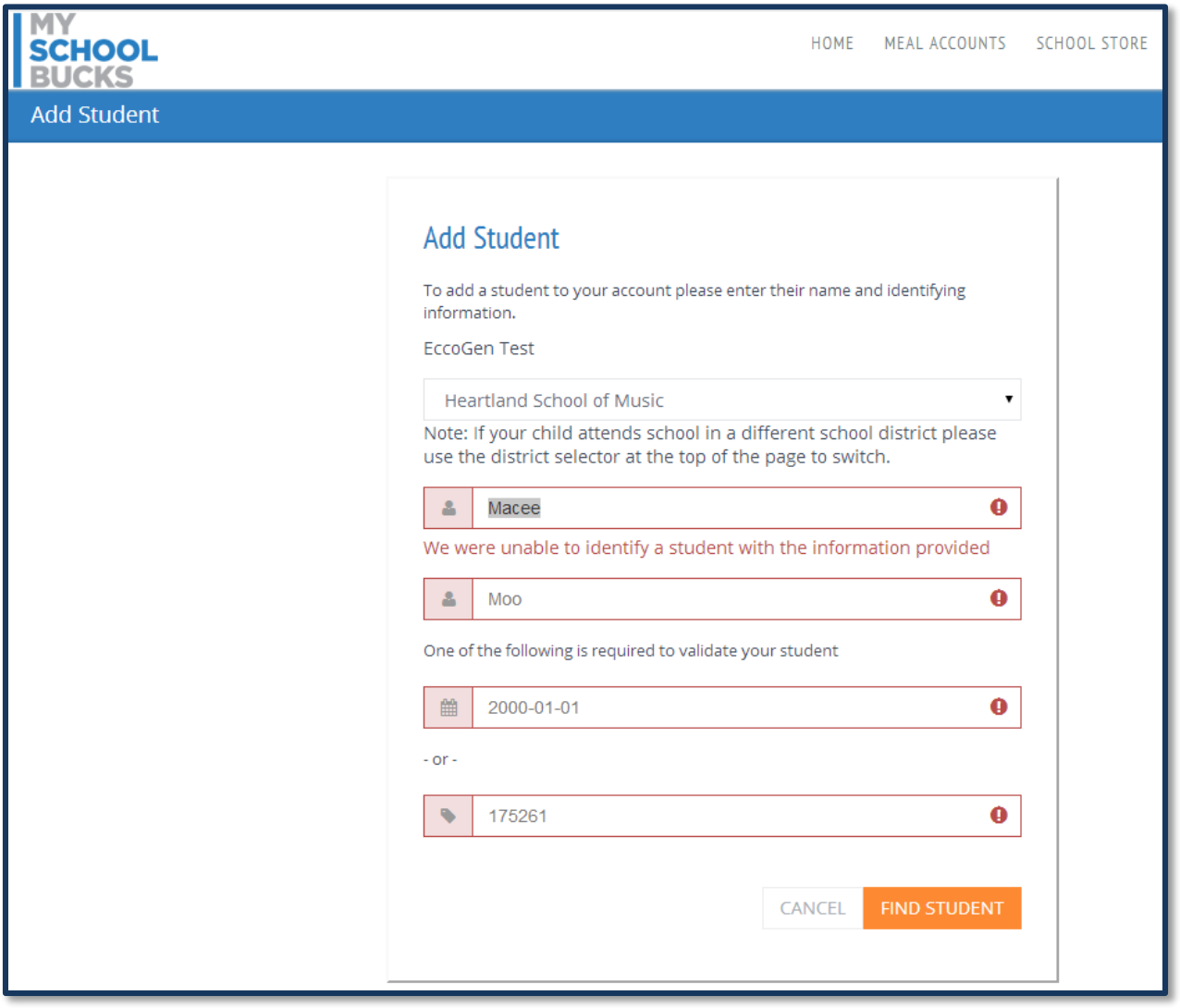


To add a student, enter the student's first and last name, date of birth, or student number and click **FIND STUDENT**.

Note: The information required to locate the student is dependent upon the individual district's settings. Some districts may require both the birthdate AND the student ID, while others may only require the birthdate OR the student ID.

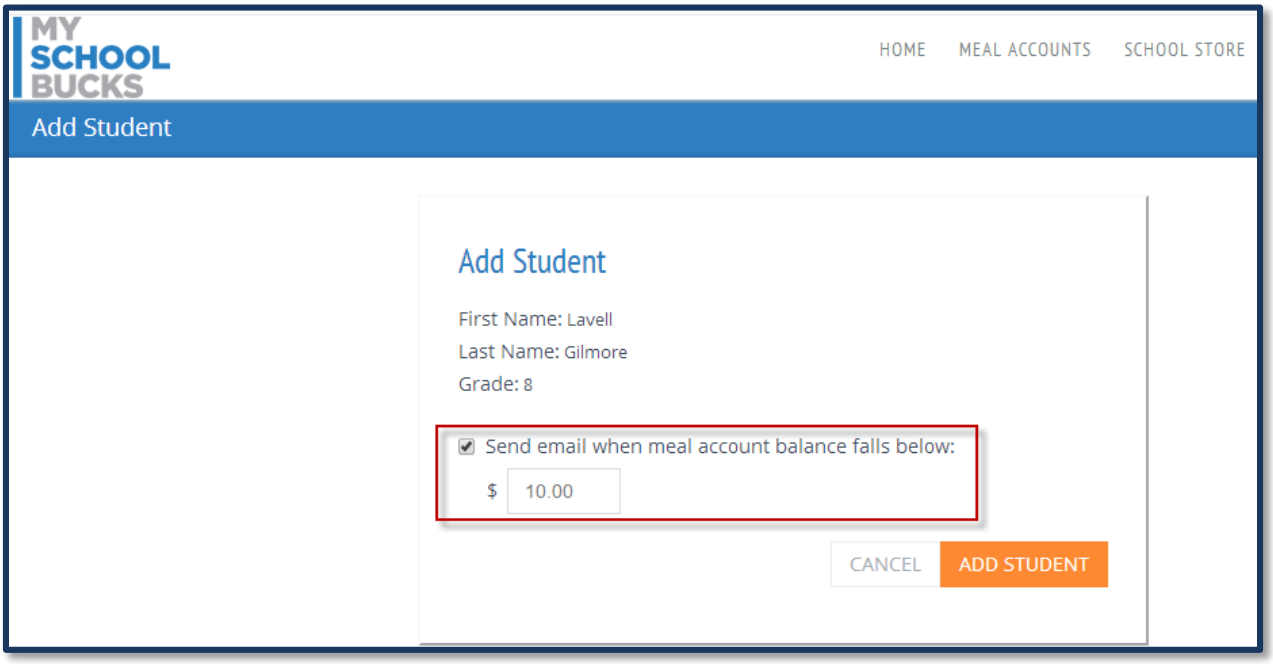

Add Student
To add a student to your account please enter their name and identifying information.
Heartland School District
Challenge Academy
Note: If your child attends school in a different school district please use the district selector at the top of the page to switch.
First Name
Last Name
One of the following is required to validate your student
Birthdate (mm/dd/yyyy)
- or -
Student Number
Don't have your child's student ID?
CANCEL
FIND STUDENT

If the student is not able to be found, they will see the below message.

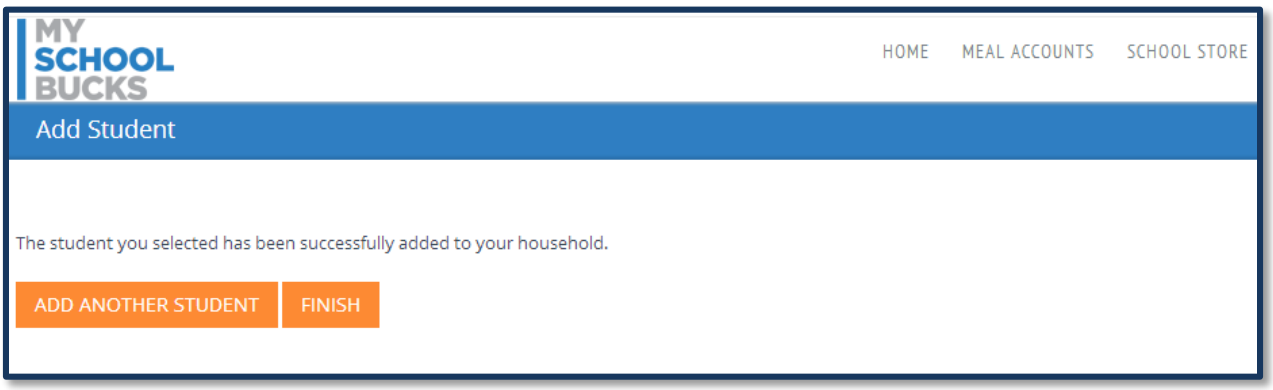

MY SCHOOL BUCKS
HOME
MEAL ACCOUNTS
SCHOOL STORE
Add Student
Add Student
To add a student to your account please enter their name and identifying information.
EccoGen Test
Heartland School of Music
Note: If your child attends school in a different school district please use the district selector at the top of the page to switch.
Macee
We were unable to identify a student with the information provided
Moo
One of the following is required to validate your student
2000-01-01
- or -
175261
CANCEL
FIND STUDENT

If they received this message, it likely means that some information was entered incorrectly. If there are no errors in the student information and the student is still not found, the parent will need to contact the school to verify their student is in their records.

Once the student is found, they will have the option to request a “low balance” email be sent to them once the student’s balance falls below a dollar amount that they choose. If they do not want a low balance email, they simply un-check the box and click **ADD STUDENT**.

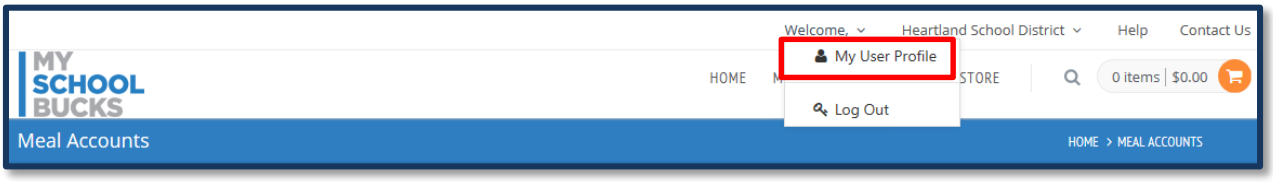


Once the student is added, they will see the below confirmation. They can click **ADD ANOTHER STUDENT** to add another student or **FINISH** to complete the process.

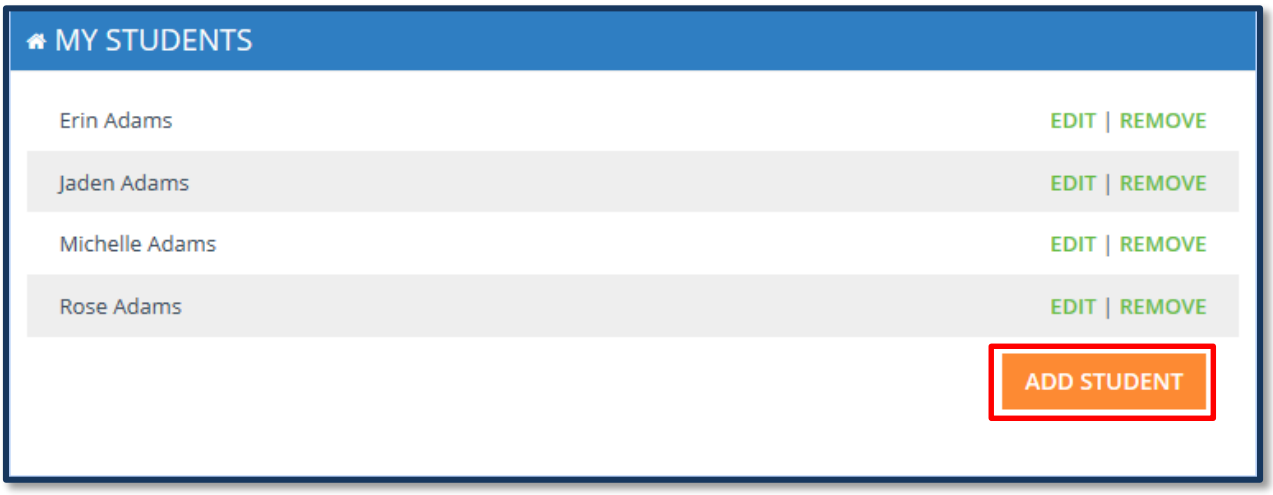


Adding a Student to an Existing Account

To add a student to an existing account, under the Welcome drop-down menu, click **My User Profile**.



Under My Students, click **ADD STUDENT**.

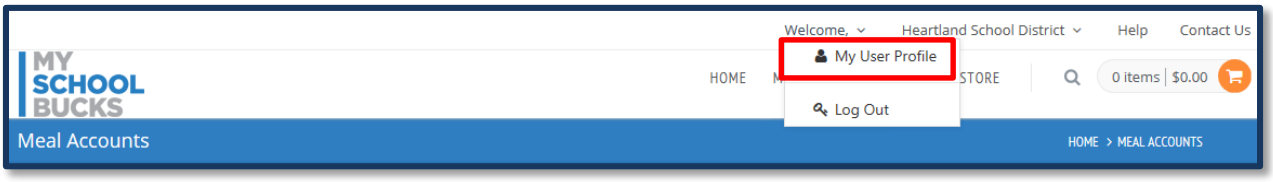


From here, the process is identical to adding a student on a new account.

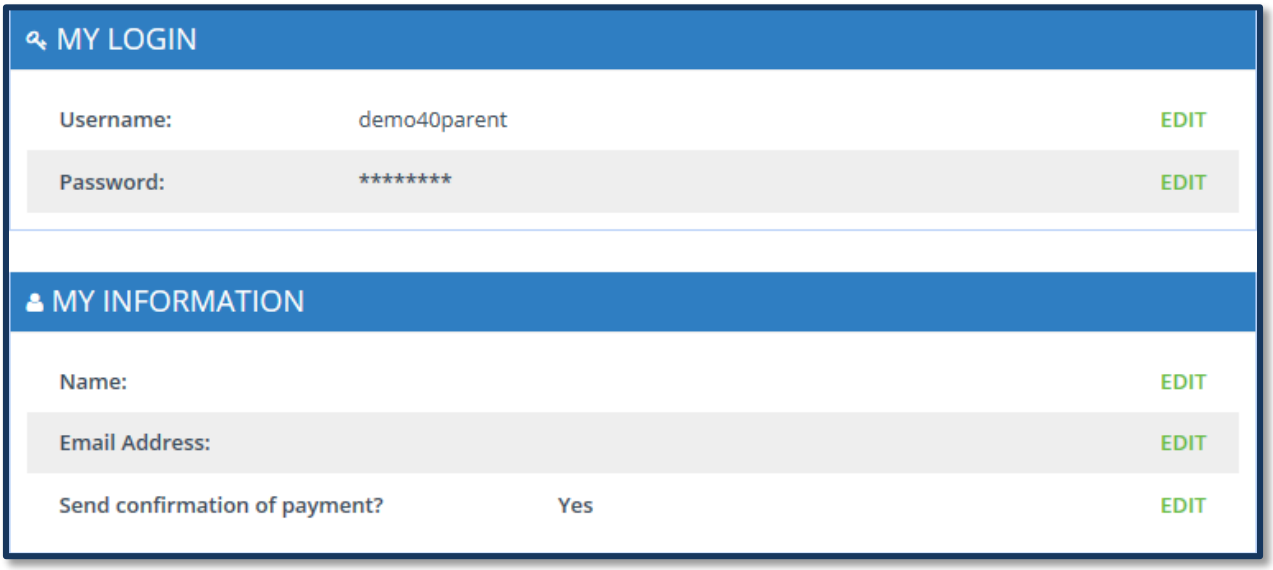
Parent Resources

User Profile

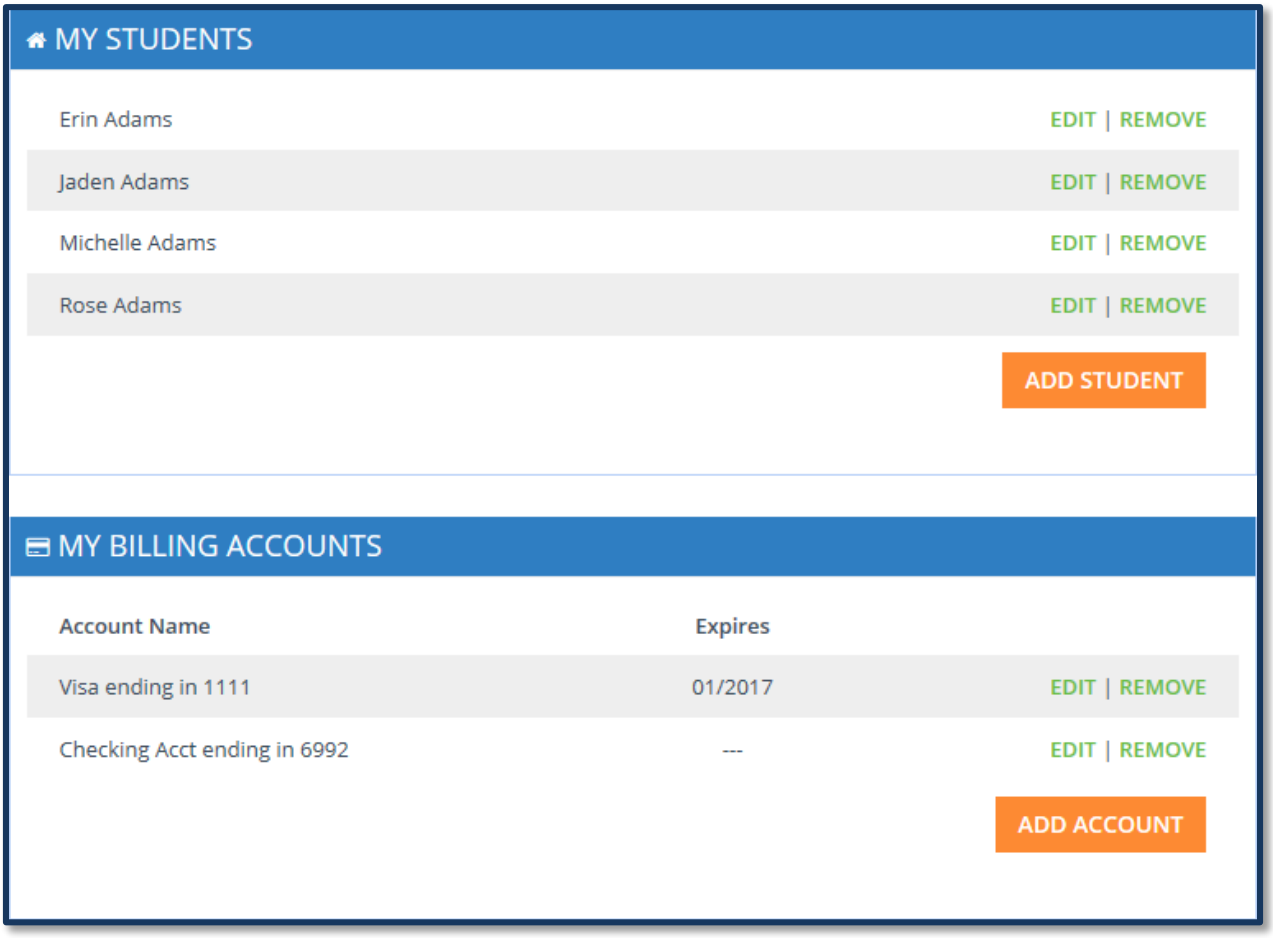
To review or change account information such as contact information or membership settings, from the Welcome drop-down menu, the user clicks **My User Profile**. The parent will also be able to click **Log Out** from here.



To edit information on this page, click **EDIT** next to the information you would like to update. For example, if you would like to change your password, click **EDIT** in the Password row under My Login.

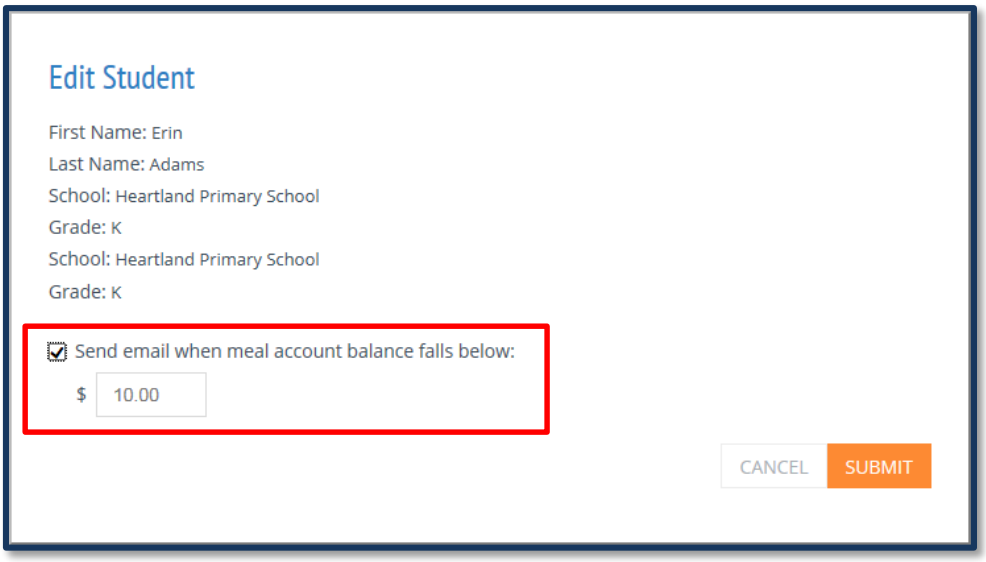


Under My Students and My Billing Accounts, in addition to editing, there are options to remove and add entries. To remove a student or billing account, click **REMOVE** next to the account you would like to delete. To add a student or billing account, click **ADD STUDENT** or **ADD ACCOUNT**.

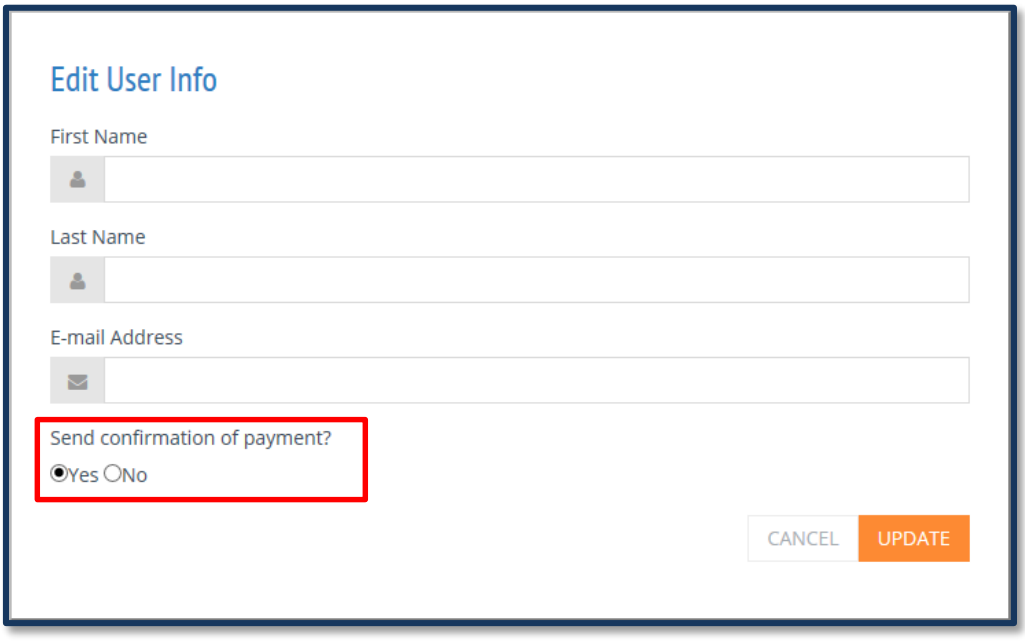


Email Preferences

Parents can sign up for email notifications to inform them when their students balance falls below a designated amount or after an order is placed. To sign up for low balance emails, click **EDIT** under My Students next to a student account, select **Send email when meal account falls below**, and enter a low balance amount. Click **SUBMIT** to confirm the changes.

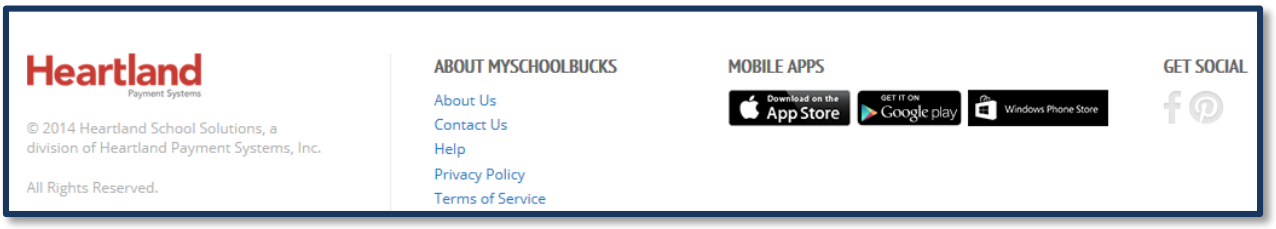


To sign up for notifications for when a payment has been made, click **EDIT** under My Information next to Send Confirmation of Payment. Then, under Send confirmation of payment, click **Yes**. Click **Update** to confirm the changes.



Downloads

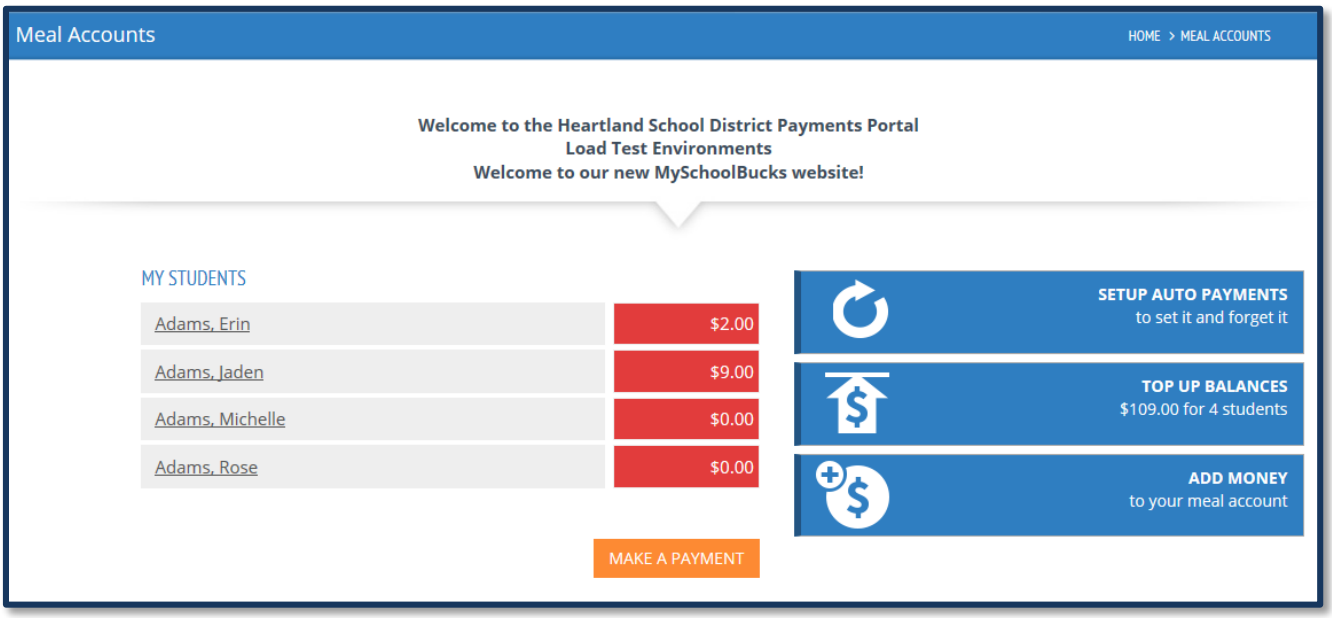
Parents can access MySchoolBucks digital applications by scrolling to the bottom of the page. Currently, mobile applications for iOS, Windows Phones, and Google Play are available to download. These resources provide users with fast and easy access to their accounts.



Meal Accounts

The Meal Accounts page is the landing page for parents every time they log in to their accounts. Here, the parents can view student balances, active scheduled payments, and recent payments.

All students that have been added to the account will be displayed here. Also displayed is the district announcement. District administrators can enter custom announcements or notes for parents in their district to view after logging in to their accounts.

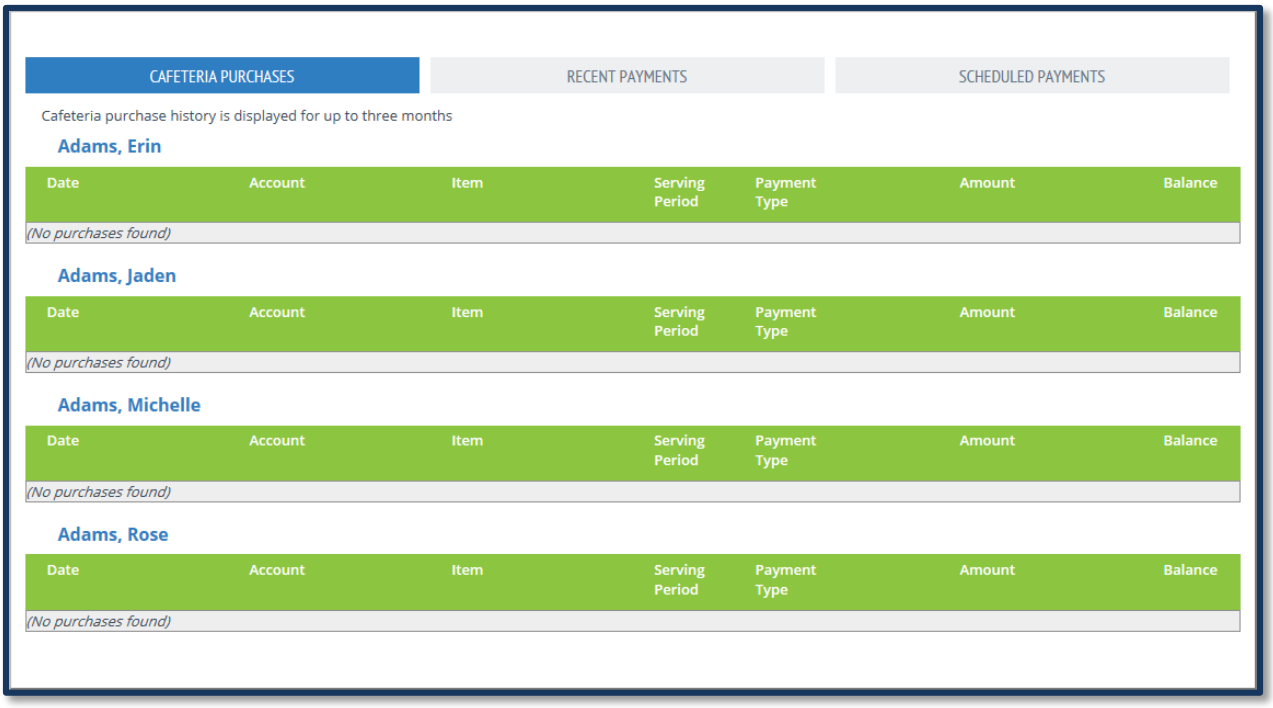


Cafeteria Meal History

The Cafeteria Meal History page displays a list of purchases and account activity for the student. Some districts utilize software that is compatible with the running balances feature in MySchoolBucks. However, many district cafeteria purchases will only display activity such as purchases and deposits.

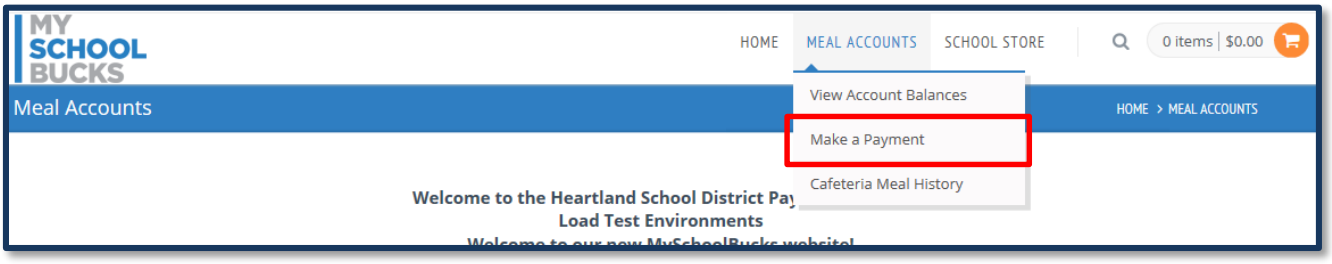
In addition to cafeteria purchases, this page also has tabs that display recent payments and scheduled payments. Click the **Recent Payments** tab to view payments made recently to your students' accounts. Click **Scheduled Payments** to view payments that are pending.

Prepayments should display in cafeteria purchases and increase the students balance within 2 business days after the date of the prepayment.



Make a Payment

To process a prepayment, the parent will select the “Make a Payment” option in the Meal Accounts drop-down menu. This will navigate them to the Place Order page.



The parent will be able to select a store such as Cafeteria Meal Payments or School Supplies. This will depend on the stores that have been set up for the school district that the student attends. If there are only cafeteria payments available, the parent will automatically be directed to the cafeteria payment options.

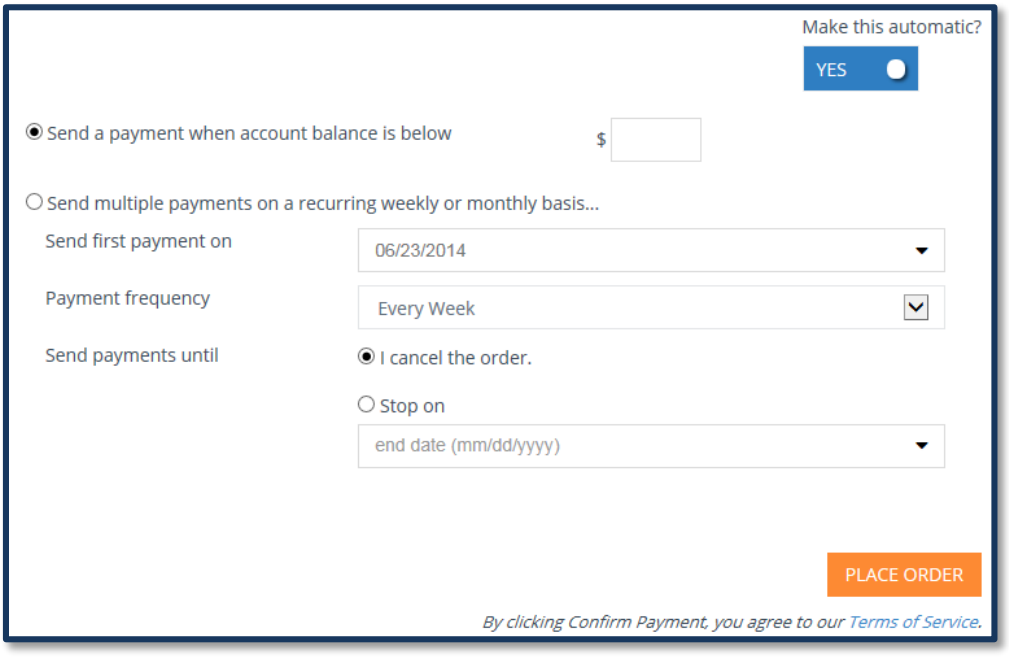
To make a payment, the parent will need to first select an amount to pay within the individual school districts’ maximum payment limits. This is typically a range of $1 to $120. However, this limit may vary depending on the district’s agreement with MySchoolBucks.

Note: On this screen, amounts in red have fallen below their “low balance” amount. Once the balance is funded, the box will turn gray.

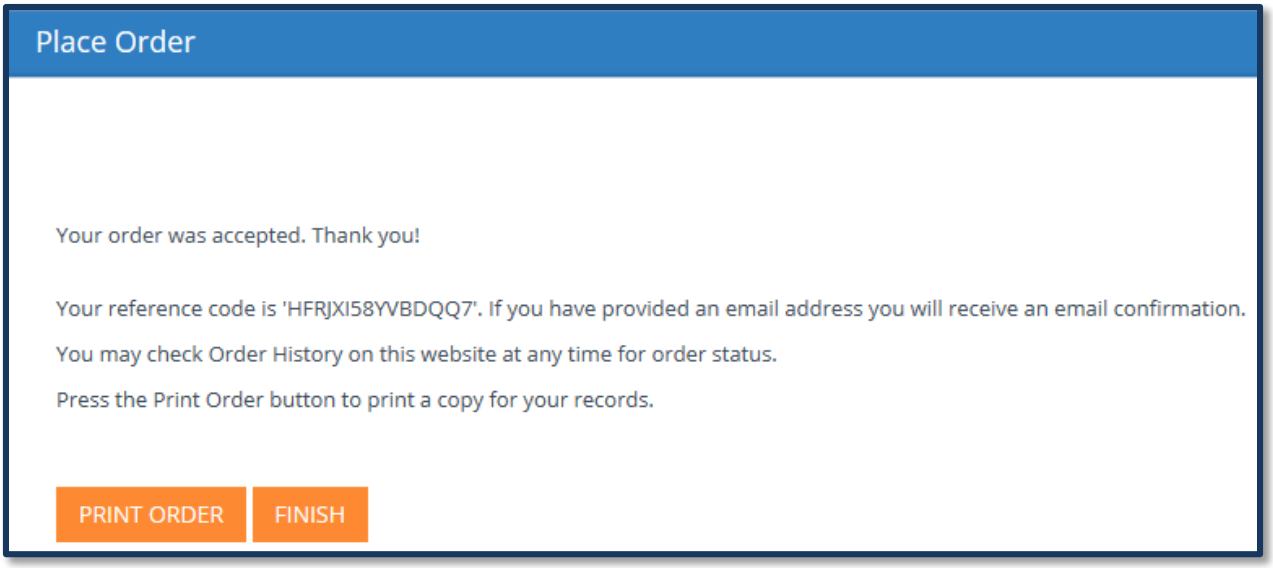
Next, the parent will select a payment method, either **eCheck** or **Credit Card**. When writing an eCheck, select the checking account from the drop-down menu. When using a credit card, select a credit card from the drop-down menu. If the preferred payment method does not appear in the menu, click **Enter a new checking account** to enter a new eCheck account or **Enter a new credit card** to enter a new credit card.

When making a payment to a lunch account, the parent has the option to make the current payment an automatic one. The selection is defaulted to **No**. This means that the current payment is made one time at the time of purchase. If the parent clicks No and changes it to **Yes**, the parent can set the current payment to recur either when the account falls below a certain balance or at sent timed intervals, such as every week after the payment. This recurring payment can be made to stop on a certain date or continue going unless the parent manually cancels the payment.

When finished making the order, the parent must click **Place Order** to place the order.

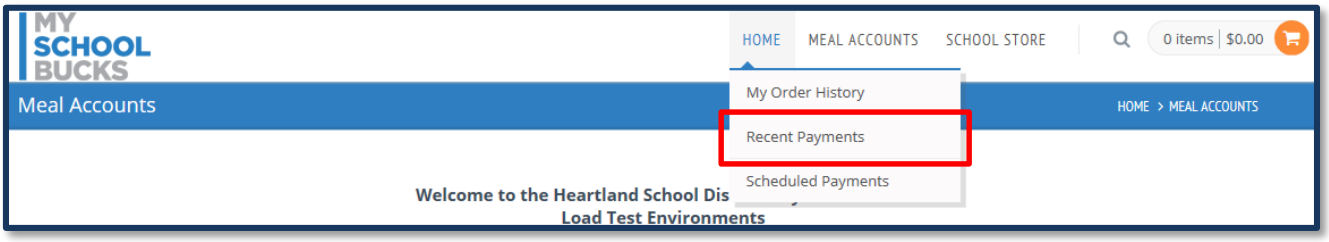


At this point, the order will be placed. If the parent has selected the option to receive an email notification when an order is placed, the notification will be sent at this time.


Place Order
Your order was accepted. Thank you!
Your reference code is 'HFRJXI58YVBDQQ7'. If you have provided an email address you will receive an email confirmation.
You may check Order History on this website at any time for order status.
Press the Print Order button to print a copy for your records.
PRINT ORDER
FINISH

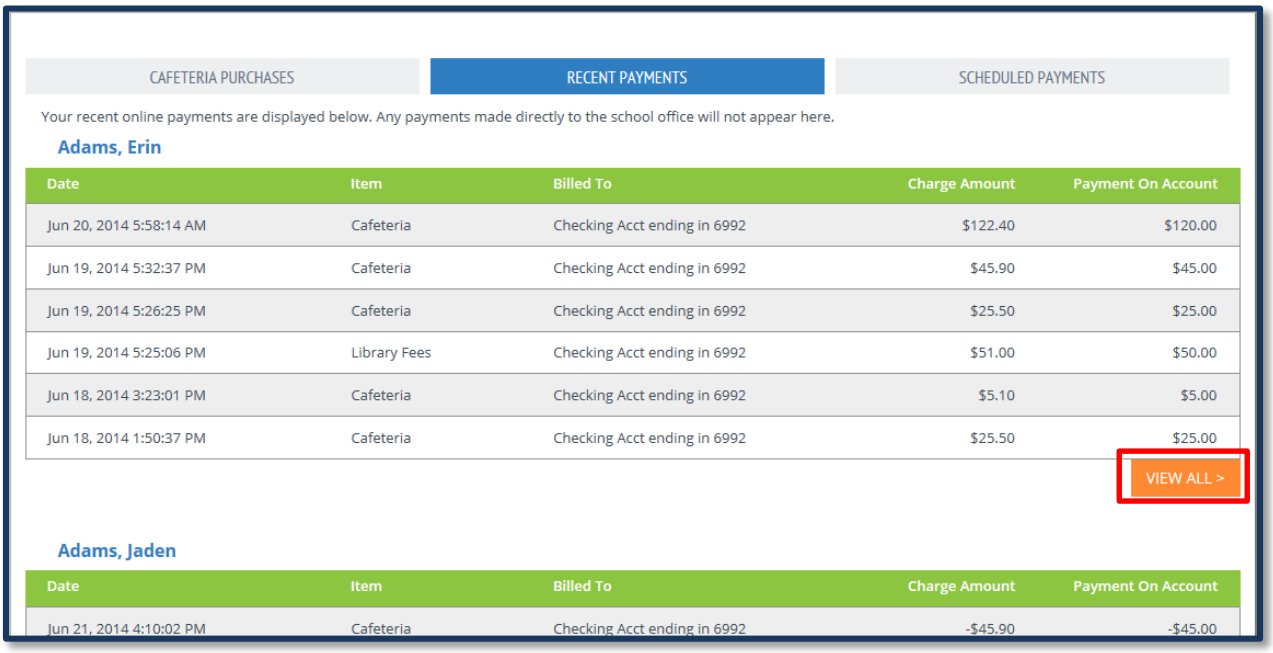
Recent Payments History

To view all payments processed from the parents account through MySchoolBucks, select **Recent Payments** from the Home drop-down menu.

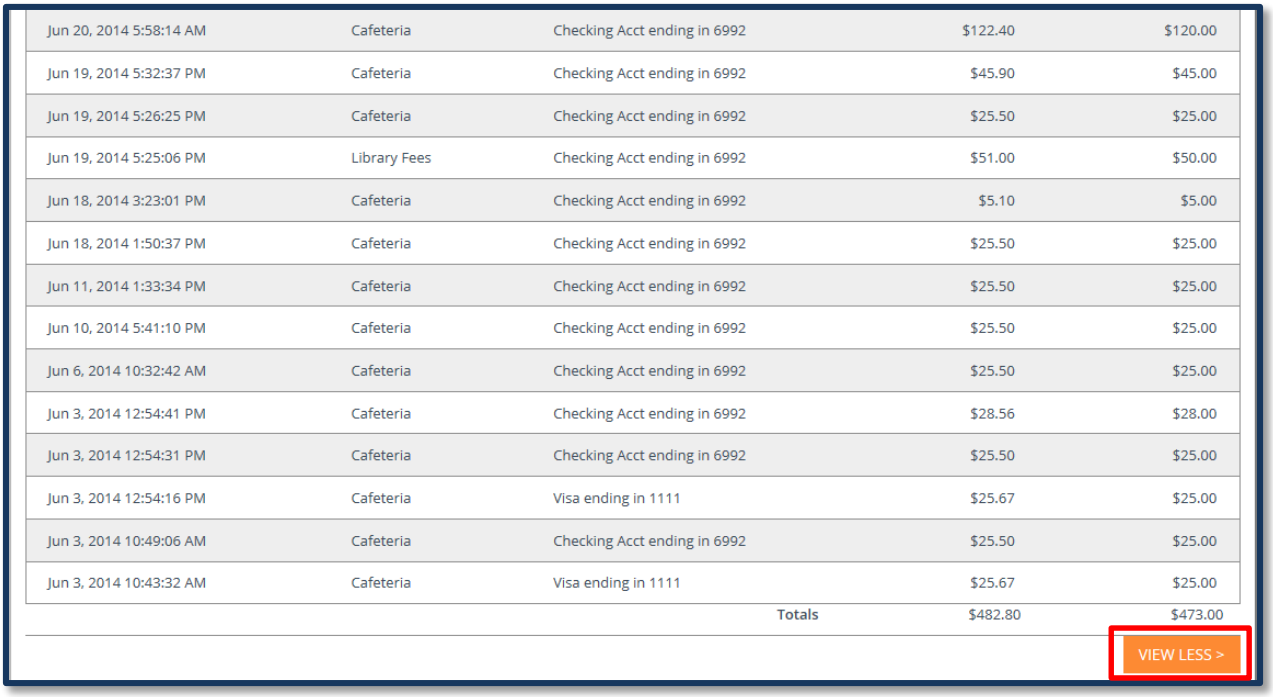


The Recent Payments page will display the most recent payments made to the school. To view all available payment records for a student's account, click View All under their account name.

Note: Payments made directly to the school or through any other service will *not* display here.

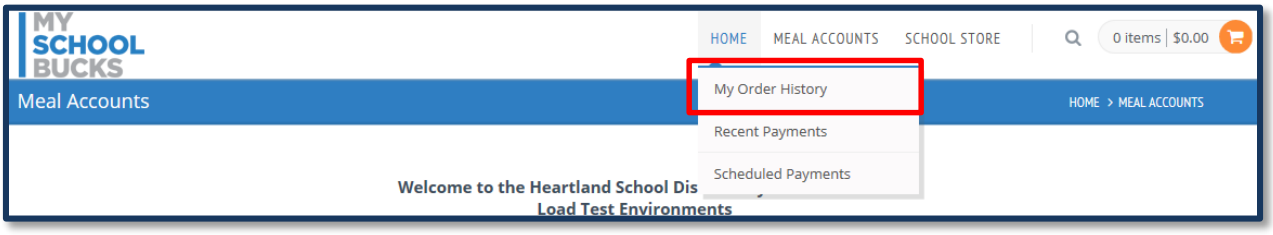

CAFETERIA PURCHASES
RECENT PAYMENTS
SCHEDULED PAYMENTS
Your recent online payments are displayed below. Any payments made directly to the school office will not appear here.
Adams, Erin
Date | Item | Billed To | Charge Amount | Payment On Account
Jun 20, 2014 5:58:14 AM | Cafeteria | Checking Acct ending in 6992 | $122.40 | $120.00
Jun 19, 2014 5:32:37 PM | Cafeteria | Checking Acct ending in 6992 | $45.90 | $45.00
Jun 19, 2014 5:26:25 PM | Cafeteria | Checking Acct ending in 6992 | $25.50 | $25.00
Jun 19, 2014 5:25:06 PM | Library Fees | Checking Acct ending in 6992 | $51.00 | $50.00
Jun 18, 2014 3:23:01 PM | Cafeteria | Checking Acct ending in 6992 | $5.10 | $5.00
Jun 18, 2014 1:50:37 PM | Cafeteria | Checking Acct ending in 6992 | $25.50 | $25.00
VIEW ALL >
Adams, Jaden
Date | Item | Billed To | Charge Amount | Payment On Account
Jun 21, 2014 4:10:02 PM | Cafeteria | Checking Acct ending in 6992 | -$45.90 | -$45.00

To collapse the payment list back to only recent payments, click **View Less**.

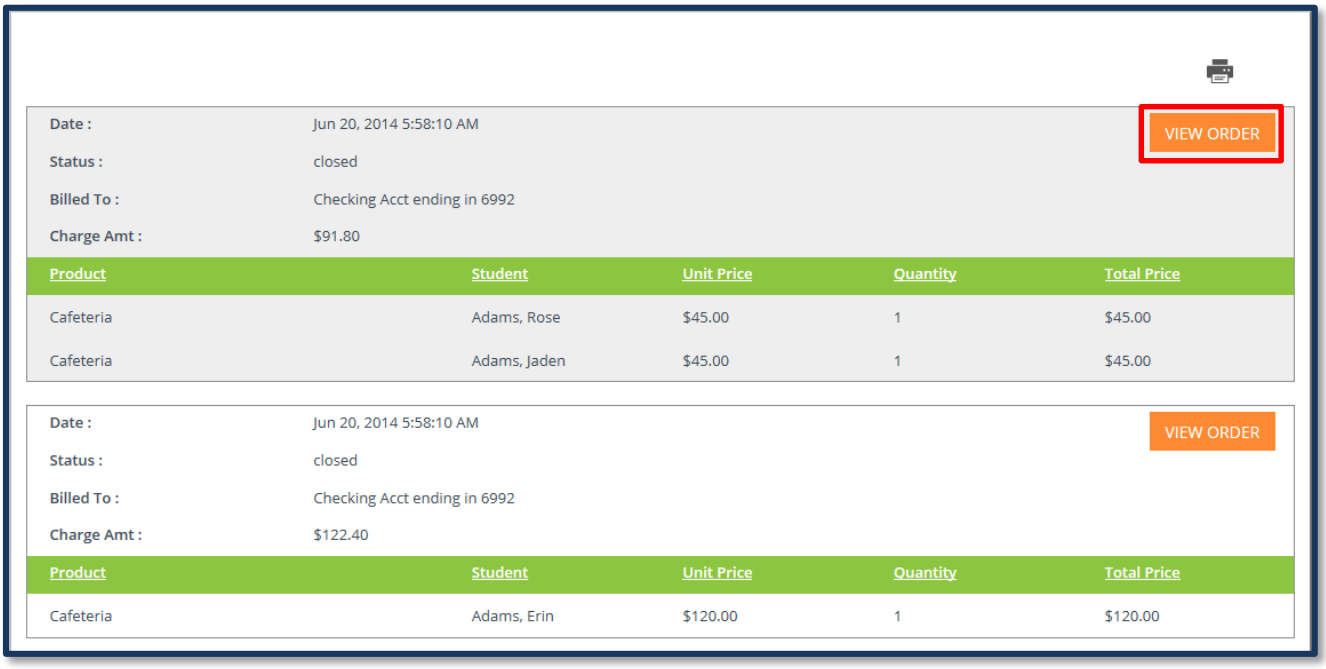

Jun 20, 2014 5:58:14 AM | Cafeteria | Checking Acct ending in 6992 | $122.40 | $120.00
Jun 19, 2014 5:32:37 PM | Cafeteria | Checking Acct ending in 6992 | $45.90 | $45.00
Jun 19, 2014 5:26:25 PM | Cafeteria | Checking Acct ending in 6992 | $25.50 | $25.00
Jun 19, 2014 5:25:06 PM | Library Fees | Checking Acct ending in 6992 | $51.00 | $50.00
Jun 18, 2014 3:23:01 PM | Cafeteria | Checking Acct ending in 6992 | $5.10 | $5.00
Jun 18, 2014 1:50:37 PM | Cafeteria | Checking Acct ending in 6992 | $25.50 | $25.00
Jun 11, 2014 1:33:34 PM | Cafeteria | Checking Acct ending in 6992 | $25.50 | $25.00
Jun 10, 2014 5:41:10 PM | Cafeteria | Checking Acct ending in 6992 | $25.50 | $25.00
Jun 6, 2014 10:32:42 AM | Cafeteria | Checking Acct ending in 6992 | $25.50 | $25.00
Jun 3, 2014 12:54:41 PM | Cafeteria | Checking Acct ending in 6992 | $28.56 | $28.00
Jun 3, 2014 12:54:31 PM | Cafeteria | Checking Acct ending in 6992 | $25.50 | $25.00
Jun 3, 2014 12:54:16 PM | Cafeteria | Visa ending in 1111 | $25.67 | $25.00
Jun 3, 2014 10:49:06 AM | Cafeteria | Checking Acct ending in 6992 | $25.50 | $25.00
Jun 3, 2014 10:43:32 AM | Cafeteria | Visa ending in 1111 | $25.67 | $25.00
Totals | $482.80 | $473.00
VIEW LESS >

My Order History

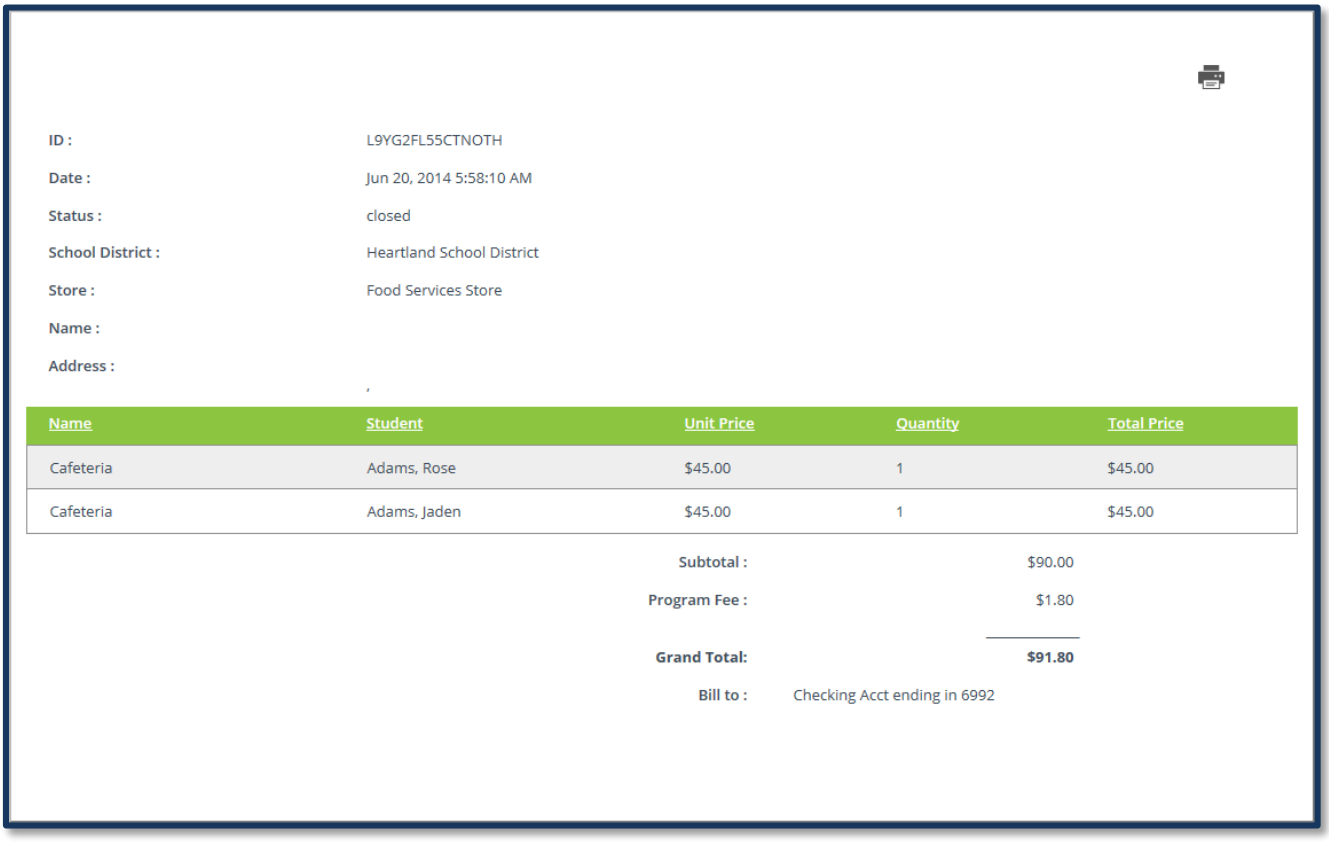
My Order History contains all orders placed through MySchoolBucks. To open the My Order History page, click **My Order History** under the Home drop-down menu.



My Order History includes both one-time prepayments and scheduled prepayments. From this location, parents can view the details of their scheduled payments such as the date that the order was placed, the frequency of the order, and the billing account that the order is being billed to. Parents can cancel their scheduled prepayments or change the billing account being used by clicking **View Order**. Parents can also print orders by clicking the printer icon.


Date : Jun 20, 2014 5:58:10 AM
VIEW ORDER
Status : closed
Billed To : Checking Acct ending in 6992
Charge Amt : $91.80
Product | Student | Unit Price | Quantity | Total Price
Cafeteria | Adams, Rose | $45.00 | 1 | $45.00
Cafeteria | Adams, Jaden | $45.00 | 1 | $45.00
Date : Jun 20, 2014 5:58:10 AM
VIEW ORDER
Status : closed
Billed To : Checking Acct ending in 6992
Charge Amt : $122.40
Product | Student | Unit Price | Quantity | Total Price
Cafeteria | Adams, Erin | $120.00 | 1 | $120.00

One-time prepayments with the status of “Closed” cannot be cancelled or voided. If a parent is requesting a refund and the order has already been closed, the parent will need to obtain the refund directly from the school.



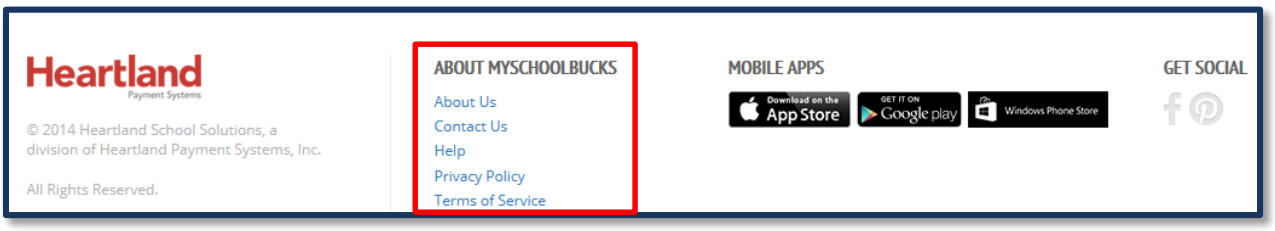
ID : L9YG2FL55CTNOTH
Date : Jun 20, 2014 5:58:10 AM
Status : closed
School District : Heartland School District
Store : Food Services Store
Name :
Address :

Name	Student	Unit Price	Quantity	Total Price
Cafeteria	Adams, Rose	$45.00	1	$45.00
Cafeteria	Adams, Jaden	$45.00	1	$45.00

Subtotal : $90.00
Program Fee : $1.80
Grand Total: $91.80
Bill to : Checking Acct ending in 6992

FAQ and Contacting Support

Users have access to the Frequently Asked Questions as well as the parent support phone number at the bottom of every page in MySchoolBucks by clicking **Help**. Parents may also send Support Requests and submit User Feedback through the **Contact Us** option in the top right corner or at the bottom of the page.

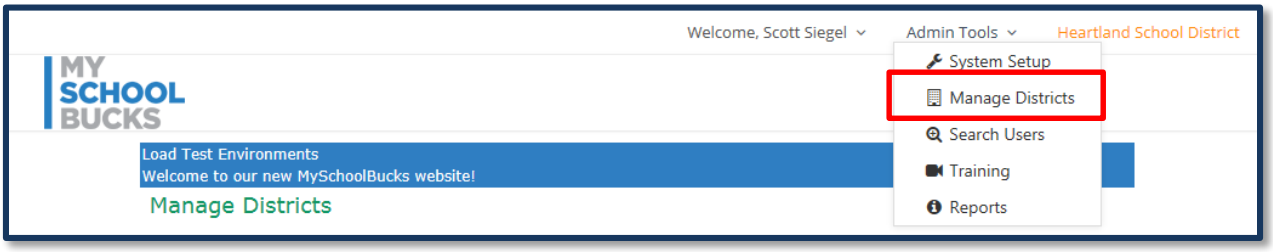


MySchoolBucks Support

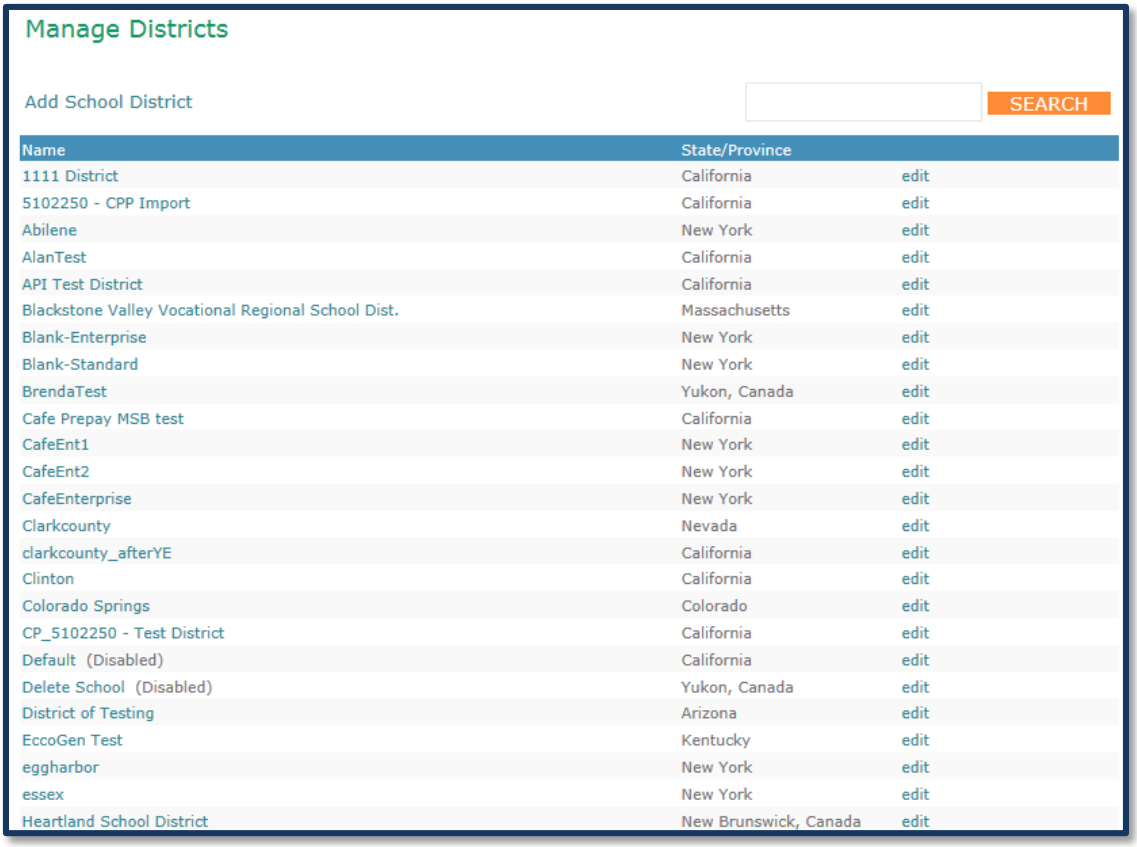
Different user accounts in MySchoolBucks may have different access levels. For obvious reasons, support accounts have the ability to view settings and features that parent accounts cannot in order to assist both parents and administrators that call in or send an email request to our support center.

District and User Searching

To locate a specific district record from a support account, under Admin Tools, click **Manage Districts**.

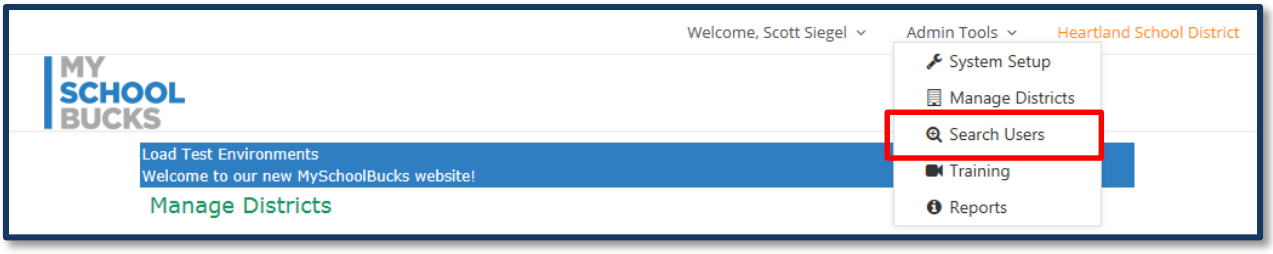


The Manage Districts page contains a searchable list of all MySchoolBucks district records.

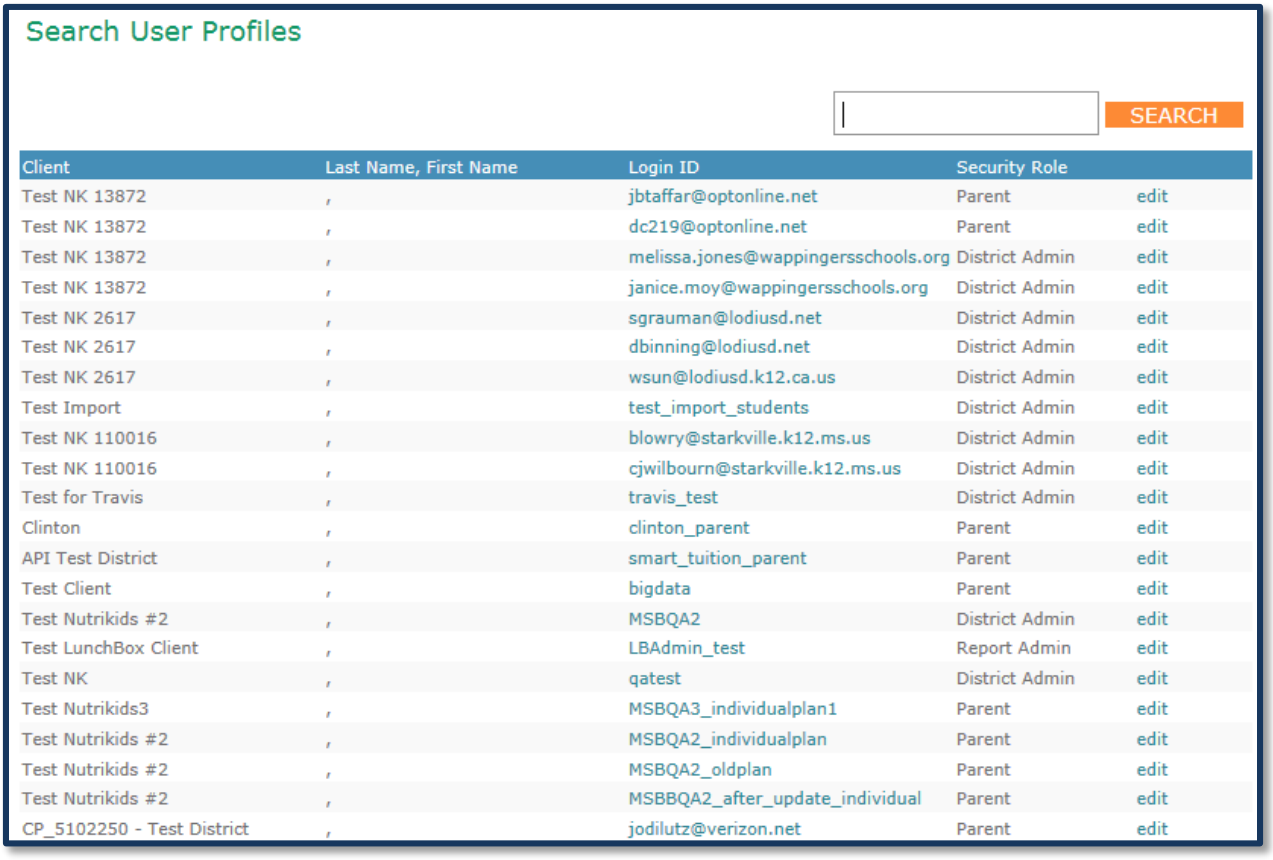


Name	State/Province	
1111 District	California	edit
5102250 - CPP Import	California	edit
Abilene	New York	edit
AlanTest	California	edit
API Test District	California	edit
Blackstone Valley Vocational Regional School Dist.	Massachusetts	edit
Blank-Enterprise	New York	edit
Blank-Standard	New York	edit
BrendaTest	Yukon, Canada	edit
Cafe Prepay MSB test	California	edit
CafeEnt1	New York	edit
CafeEnt2	New York	edit
CafeEnterprise	New York	edit
Clarkcounty	Nevada	edit
clarkcounty_afterYE	California	edit
Clinton	California	edit
Colorado Springs	Colorado	edit
CP_5102250 - Test District	California	edit
Default (Disabled)	California	edit
Delete School (Disabled)	Yukon, Canada	edit
District of Testing	Arizona	edit
EccoGen Test	Kentucky	edit
eggharbor	New York	edit
essex	New York	edit
Heartland School District	New Brunswick, Canada	edit

To perform a site-wide search for a specific user account, under Admin Tools, click Search Users.



The Search Users page allows partial searches of the Account Holder (Parent) name as well as the E-mail address on the account.



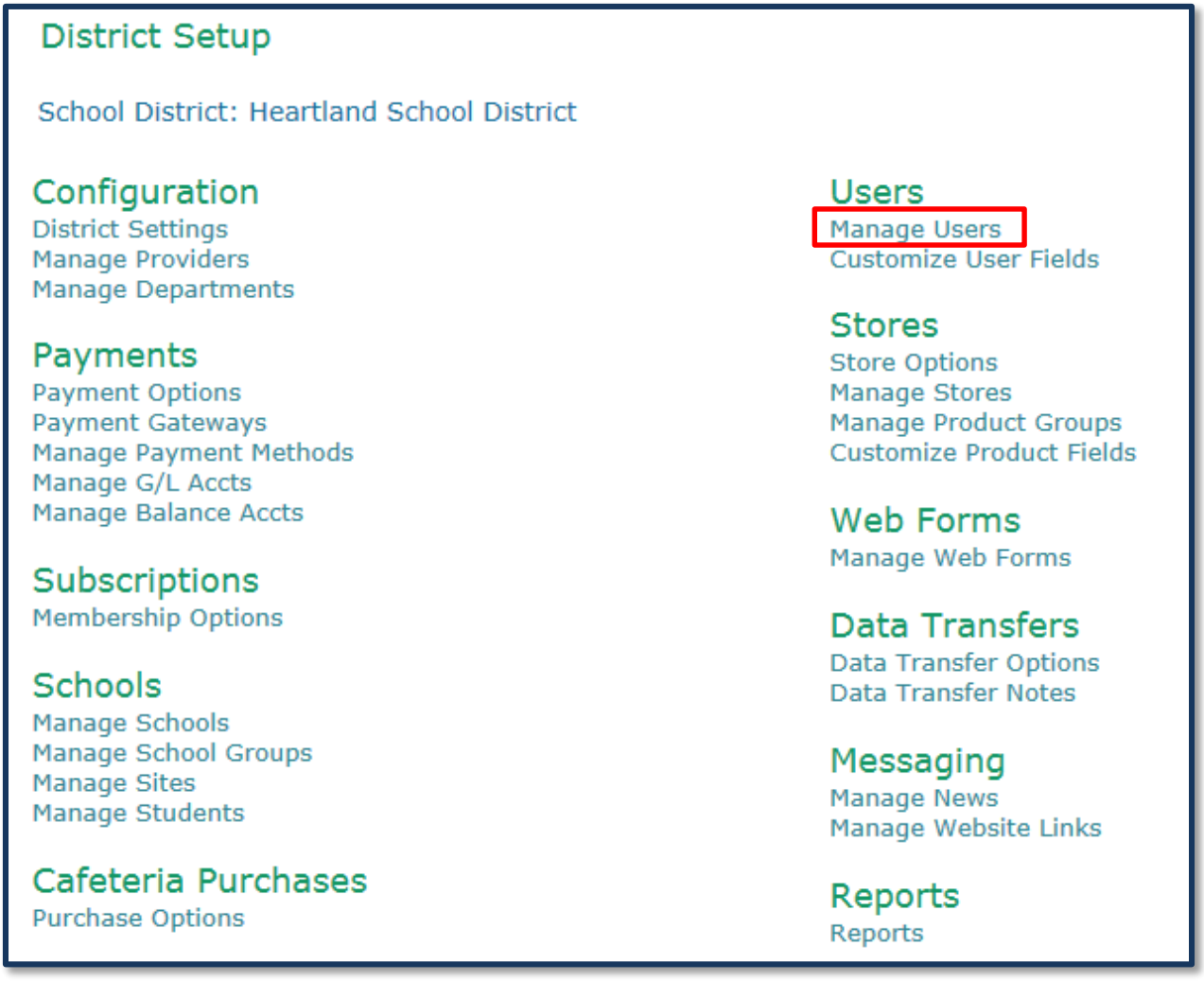
Client	Last Name, First Name	Login ID	Security Role	
Test NK 13872	,	jbtaffar@optonline.net	Parent	edit
Test NK 13872	,	dc219@optonline.net	Parent	edit
Test NK 13872	,	melissa.jones@wappingersschools.org	District Admin	edit
Test NK 13872	,	janice.moy@wappingersschools.org	District Admin	edit
Test NK 2617	,	sgrauman@lodiusd.net	District Admin	edit
Test NK 2617	,	dbinning@lodiusd.net	District Admin	edit
Test NK 2617	,	wsun@lodiusd.k12.ca.us	District Admin	edit
Test Import	,	test_import_students	District Admin	edit
Test NK 110016	,	blowry@starkville.k12.ms.us	District Admin	edit
Test NK 110016	,	cjwilbourn@starkville.k12.ms.us	District Admin	edit
Test for Travis	,	travis_test	District Admin	edit
Clinton	,	clinton_parent	Parent	edit
API Test District	,	smart_tuition_parent	Parent	edit
Test Client	,	bigdata	Parent	edit
Test Nutrikids #2	,	MSBQA2	District Admin	edit
Test LunchBox Client	,	LBAdmin_test	Report Admin	edit
Test NK	,	qatest	District Admin	edit
Test Nutrikids3	,	MSBQA3_individualplan1	Parent	edit
Test Nutrikids #2	,	MSBQA2_individualplan	Parent	edit
Test Nutrikids #2	,	MSBQA2_oldplan	Parent	edit
Test Nutrikids #2	,	MSBBQA2_after_update_individual	Parent	edit
CP_5102250 - Test District	,	jodilutz@verizon.net	Parent	edit

District Setup

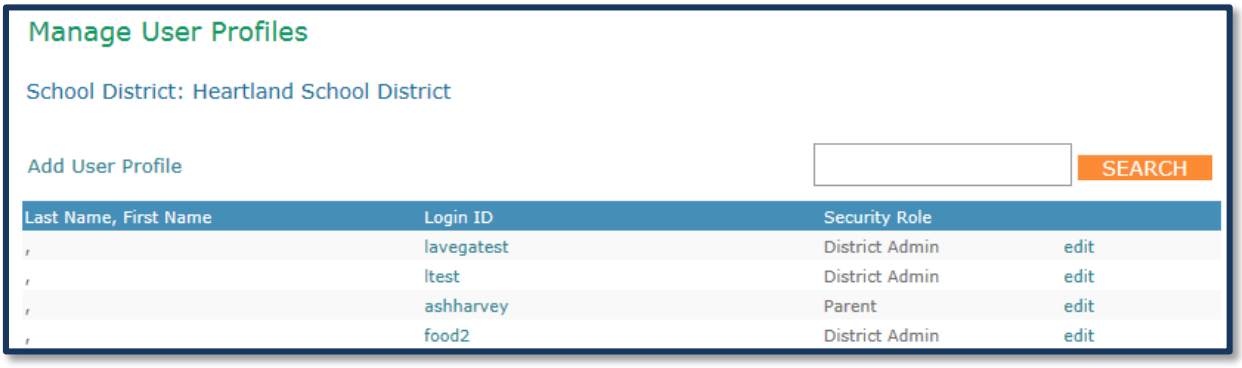
Selecting the district name will navigate you to the District Setup page. From this location, you can access all of the features and settings for the individual school district that was selected.

Manage Users:

You may perform a user search for the selected district by clicking **Manage Users**.



The Manage Users page provides a list of all users registered under the selected school district.



To view the students added to a specific parent account, select the desired parent account login name, and then click **Login As**. This will give you the access level of the selected account. In order to return to your support account to view other users or a district setup page, you will need to log out of the current account that is being emulated and log in once again under your support credentials.

Password Reset

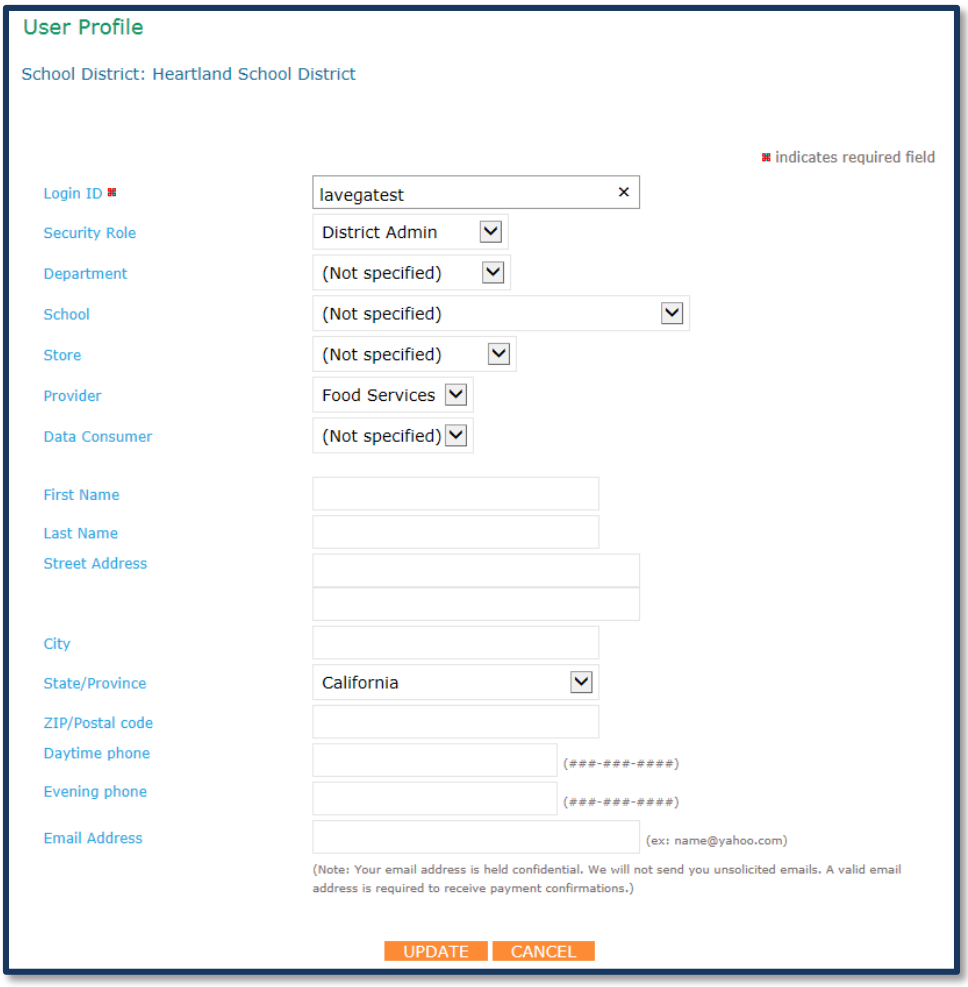
If a user requires login assistance, selecting the “Send Pwd Reset Email” from the User Profile while logged into a support account will immediately send an email to the account on file. This email will contain a link that will navigate the user to the MySchoolBucks website and allow them to create a new password for their account.

Hierarchy of Users

The security role of an account determines the level of access the selected user will have to the website. For example, a District Admin account will be able to view and edit all of the settings for their specified school district while a Report Admin account will only be able to view the “Reports” portion of their specified district.

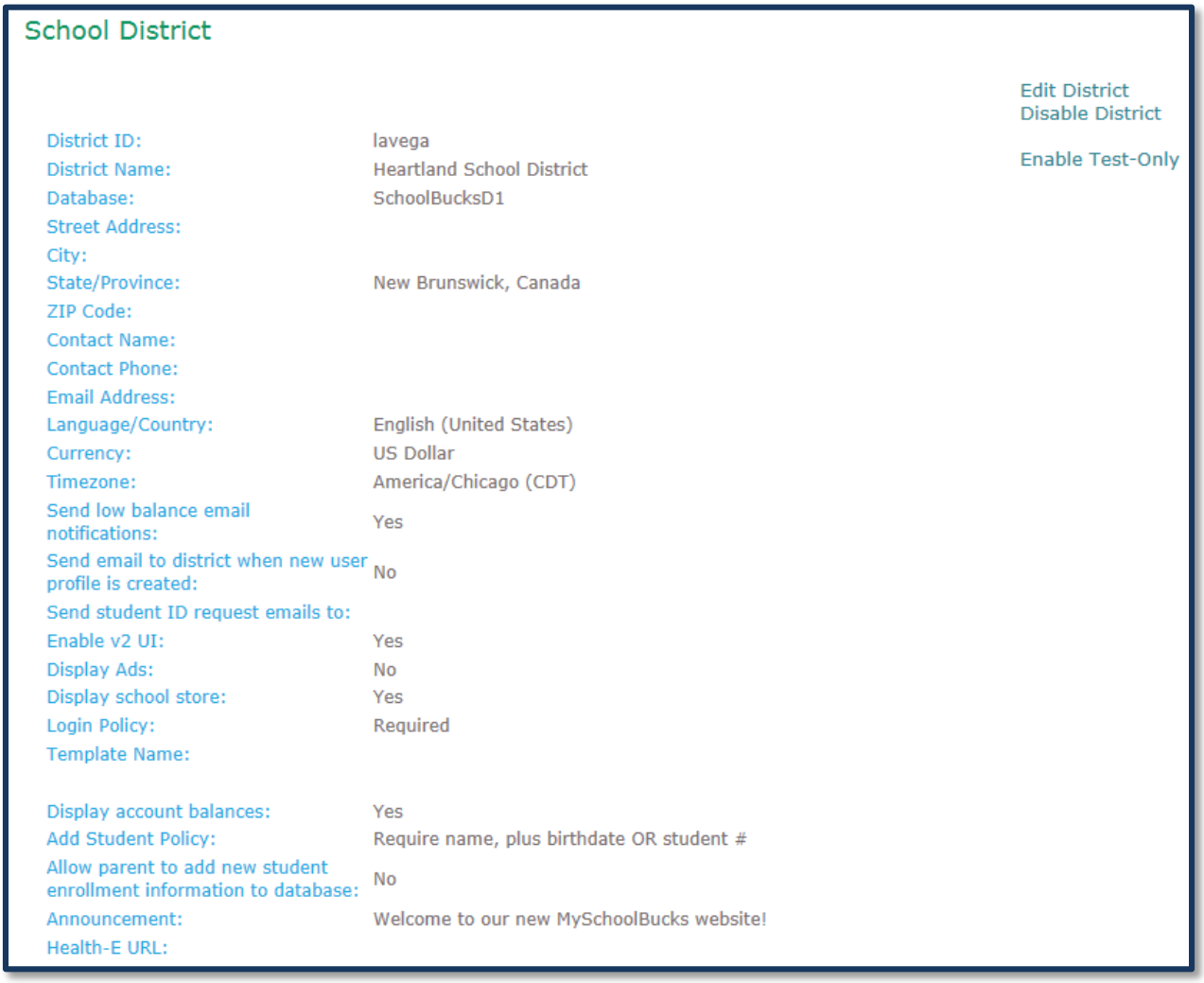
Security Role

The security role of an account can be updated by clicking **Edit Profile** from the user profile page and selecting a role from the Security Role drop-down menu.



District Settings

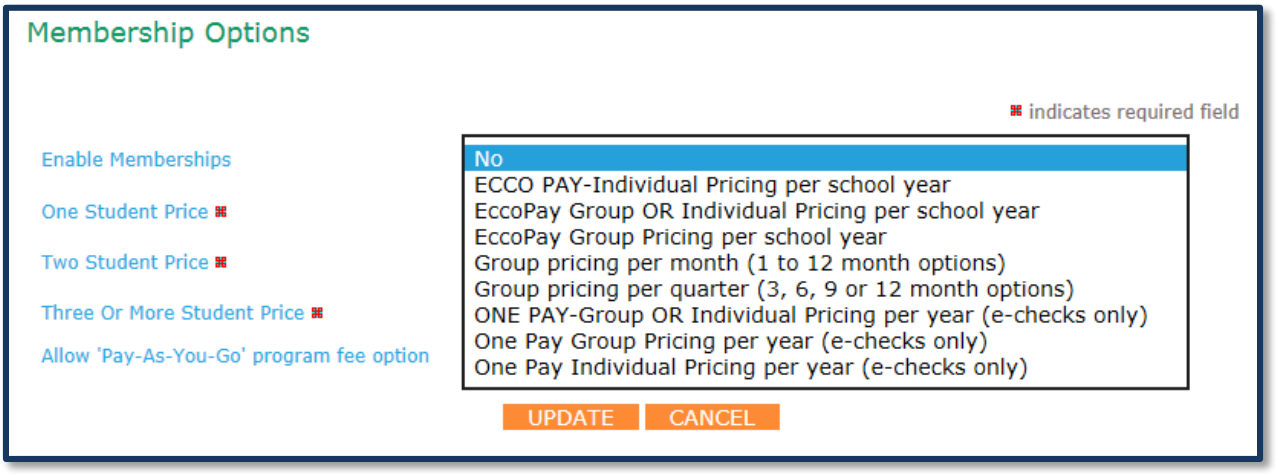
The District Settings page shows general information for the district, such as their desired contact information and their general settings.



Membership Options

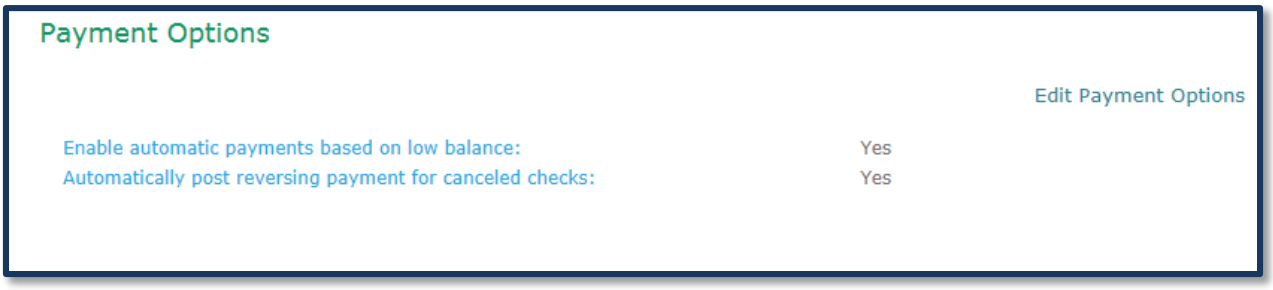
Many districts utilize the membership options in MySchoolBucks. There are a number of options that districts may choose to make available for parents. These plans allow parents to make a low quarterly payment that will waive the regular transaction fee for every other payment that they process through the website.

Membership Options
Edit Options
Enable Memberships: Group pricing per month (1 to 12 month options)
One Student Price: $8.00
Two Student Price: $15.00
Three Or More Student Price: $27.00
Allow 'Pay-As-You-Go' program fee option: No


Membership Options
indicates required field
Enable Memberships
One Student Price
Two Student Price
Three Or More Student Price
Allow 'Pay-As-You-Go' program fee option
No
ECCO PAY-Individual Pricing per school year
EccoPay Group OR Individual Pricing per school year
EccoPay Group Pricing per school year
Group pricing per month (1 to 12 month options)
Group pricing per quarter (3, 6, 9 or 12 month options)
ONE PAY-Group OR Individual Pricing per year (e-checks only)
One Pay Group Pricing per year (e-checks only)
One Pay Individual Pricing per year (e-checks only)
UPDATE
CANCEL

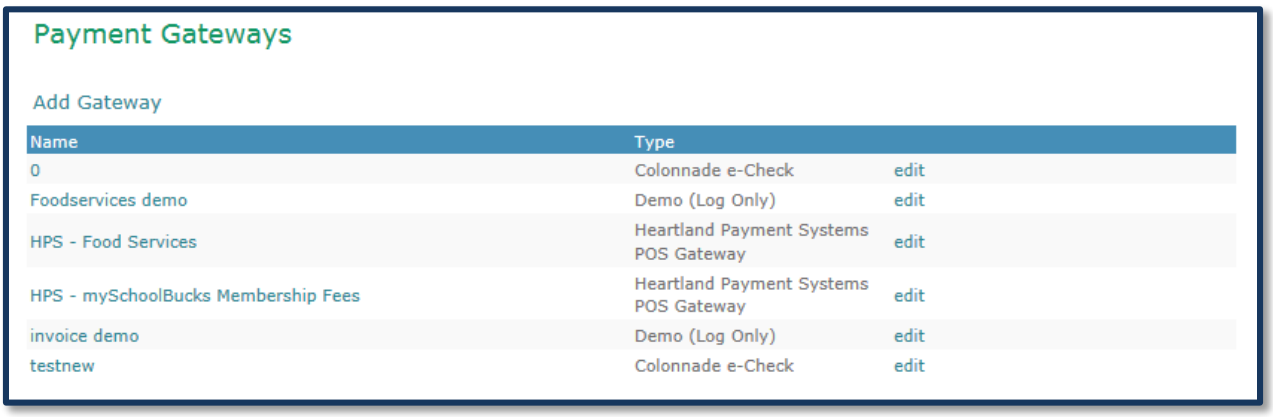
Payment Options

The Payment Options page displays the current general payment options for the district.


Payment Options
Edit Payment Options
Enable automatic payments based on low balance: Yes
Automatically post reversing payment for canceled checks: Yes

Payment Gateways

To view the Gateways for the district, click **Payment Gateways** from the District Setup page. These are the settings for the Gateways that all payments are processed through. For example, Heartland credit cards will typically be identified as “HPS – Food Services” while eCheck payments will be identified as “HPS – ACH Food Services.”

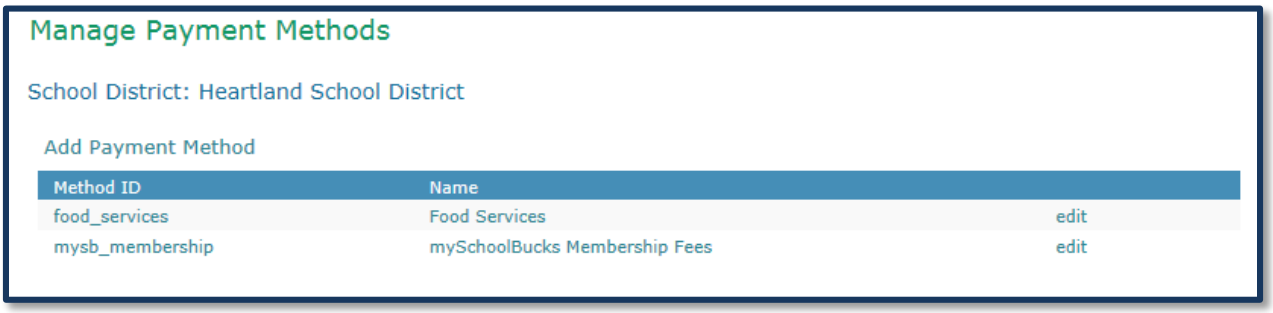


Selecting the name of a Gateway will navigate you to the Gateways Detail page. This location will display the Transaction fee that is currently in place for the selected Gateway.

Note: For Heartland Credit Card Processing Gateways, the districts Merchant ID will be listed as the “User ID.”

Manage Payment Methods

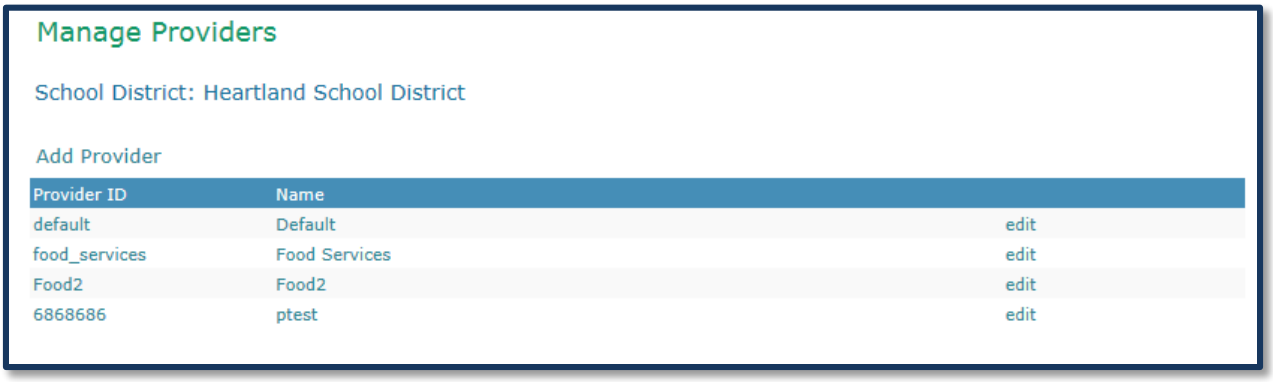
To view the payment methods accepted for a school district, from the District Setup menu, click **Manage Payment Methods**. The payment method details will display the Gateways that utilize the specific payment methods.



Clicking the name of a payment method displays details for the payment method.

Manage Providers

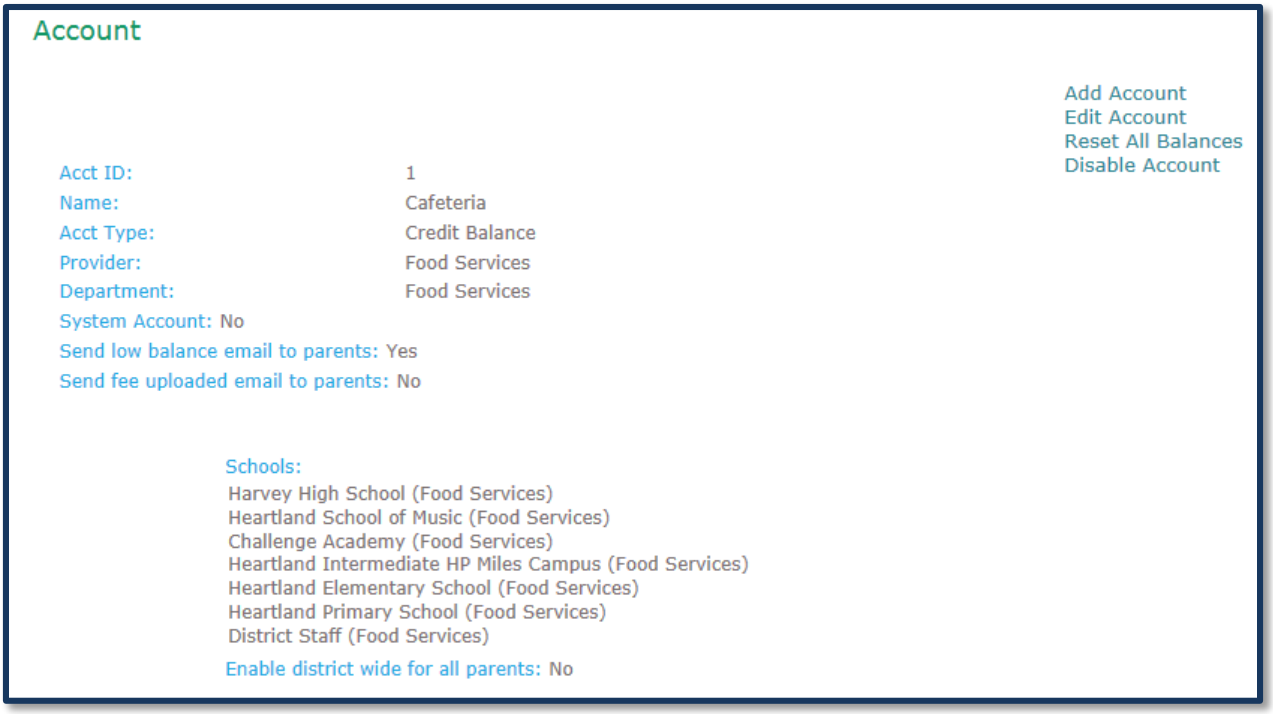
The Manage Providers page lists the software provider for each school district. (for example: Nutrikids, eTrition 7, etc.)



Manage Balance Accounts

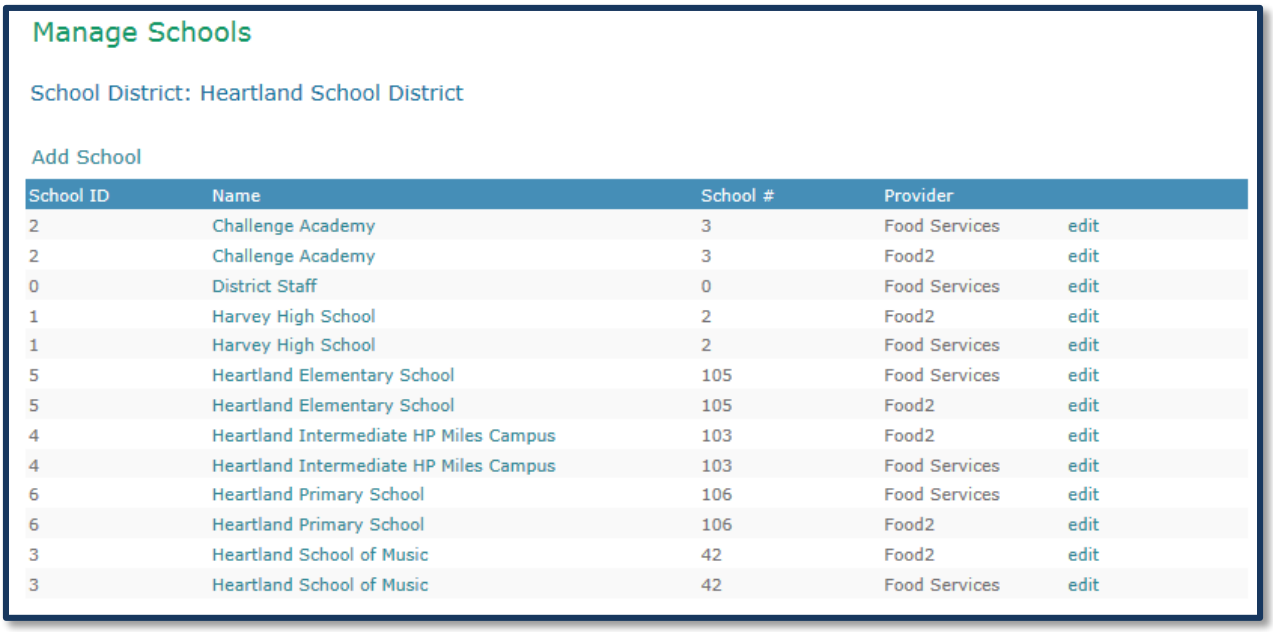
Balance accounts are a part of the payment structure that exists behind the scenes in MySchoolBucks. These are set up to hold and display balance information within parent accounts. Click the name of a balance account to display details of the account.

Note: In some situations, all schools will be assigned to one specific balance account, while there are some school districts that have separate balance accounts designated for each site.



Manage Schools

The Manage Schools page displays a list of school sites that have been established under the school district.

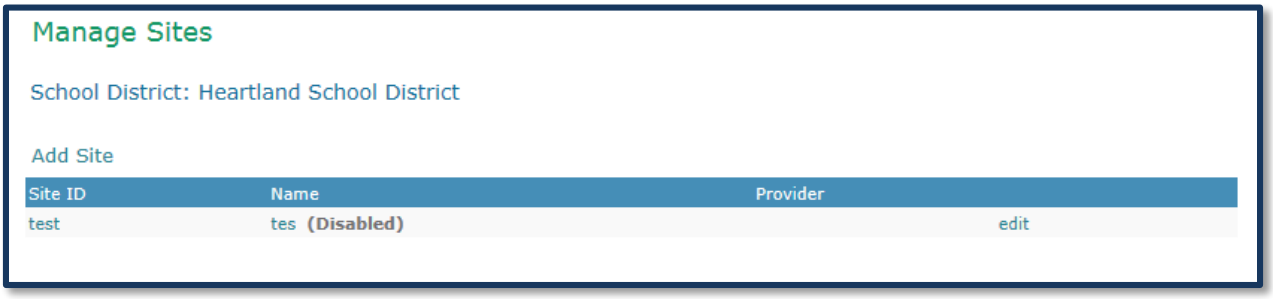


School ID	Name	School #	Provider	
2	Challenge Academy	3	Food Services	edit
2	Challenge Academy	3	Food2	edit
0	District Staff	0	Food Services	edit
1	Harvey High School	2	Food2	edit
1	Harvey High School	2	Food Services	edit
5	Heartland Elementary School	105	Food Services	edit
5	Heartland Elementary School	105	Food2	edit
4	Heartland Intermediate HP Miles Campus	103	Food2	edit
4	Heartland Intermediate HP Miles Campus	103	Food Services	edit
6	Heartland Primary School	106	Food Services	edit
6	Heartland Primary School	106	Food2	edit
3	Heartland School of Music	42	Food2	edit
3	Heartland School of Music	42	Food Services	edit

Manage Sites

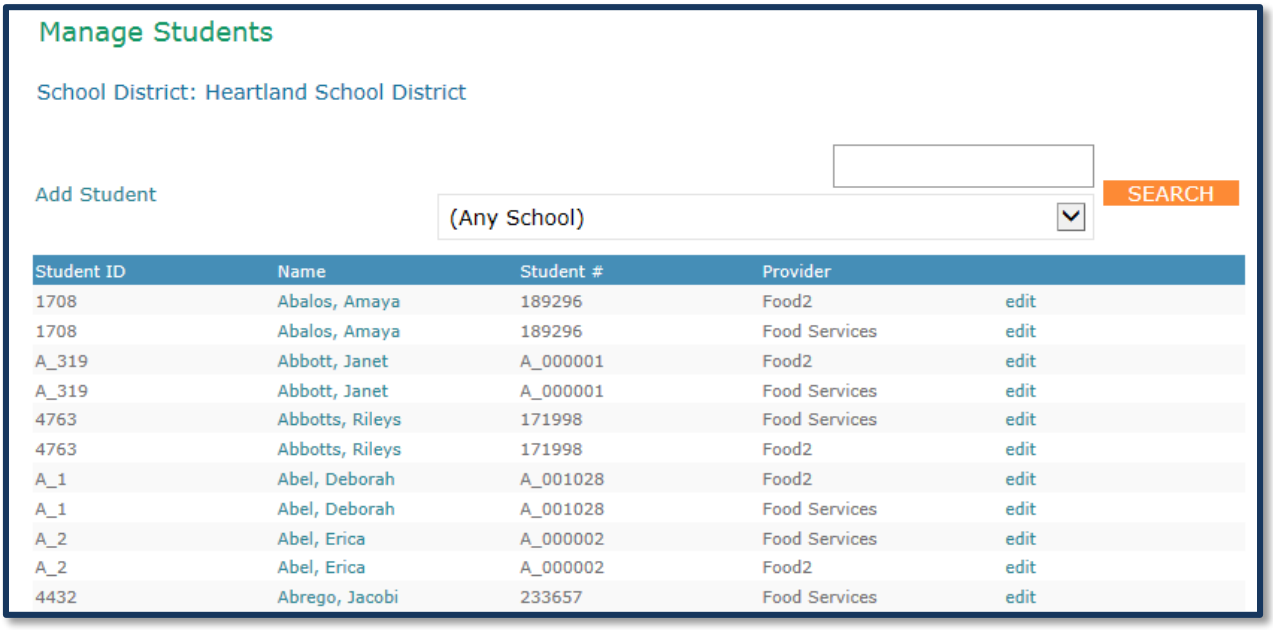
Note: This function is only for users utilizing Lunchbox.

The Manage Sites page displays school sites that have been established for the district, as well as disabled sites.



Manage Students

From District Settings, click **Manage Students** to view a searchable list of all student records for the selected school district. You may also filter your search by selecting a School name in the drop down menu. The Student # is the number that is assigned by the school district while the Student ID is the identification number issued by MySchoolBucks. Parents will only be prompted for the Student # when adding their student.


Manage Students
School District: Heartland School District
Add Student
(Any School)
SEARCH
Student ID
Name
Student #
Provider
1708 Abalos, Amaya 189296 Food2 edit
1708 Abalos, Amaya 189296 Food Services edit
A_319 Abbott, Janet A_000001 Food2 edit
A_319 Abbott, Janet A_000001 Food Services edit
4763 Abbotts, Rileys 171998 Food Services edit
4763 Abbotts, Rileys 171998 Food2 edit
A_1 Abel, Deborah A_001028 Food2 edit
A_1 Abel, Deborah A_001028 Food Services edit
A_2 Abel, Erica A_000002 Food Services edit
A_2 Abel, Erica A_000002 Food2 edit
4432 Abrego, Jacobi 233657 Food Services edit

Clicking a student's name will direct you to the student's detail page. Here, you can view the school site, birthdate, and active status of the student. When parents are adding a student to their account, this is the information that the system checks against.

Note: Adult or employee accounts are usually identified with an "A_" preceding their Student number and/or Student ID.

Purchase Options

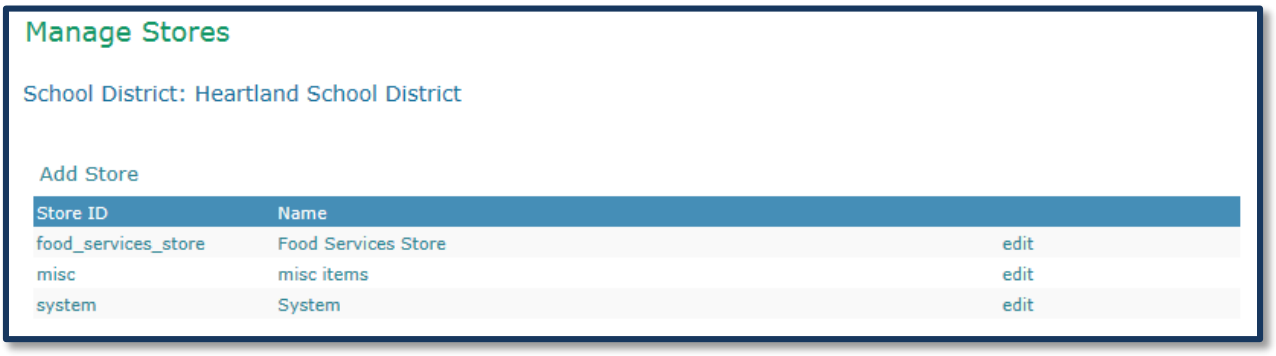
This option allows you to see Cafeteria Purchase settings, including whether running balances for student accounts are displayed.

Note: There are only certain types of software that are compatible with the running balances feature in MySchoolBucks.

Cafeteria Purchase Options
Edit Options
Show cafeteria purchase history: Yes
Student Balance Policy: Balance shared between schools (eTrition, LunchBox)
Show running balances: Yes
Enable See My Plate™: Yes

Manage Stores

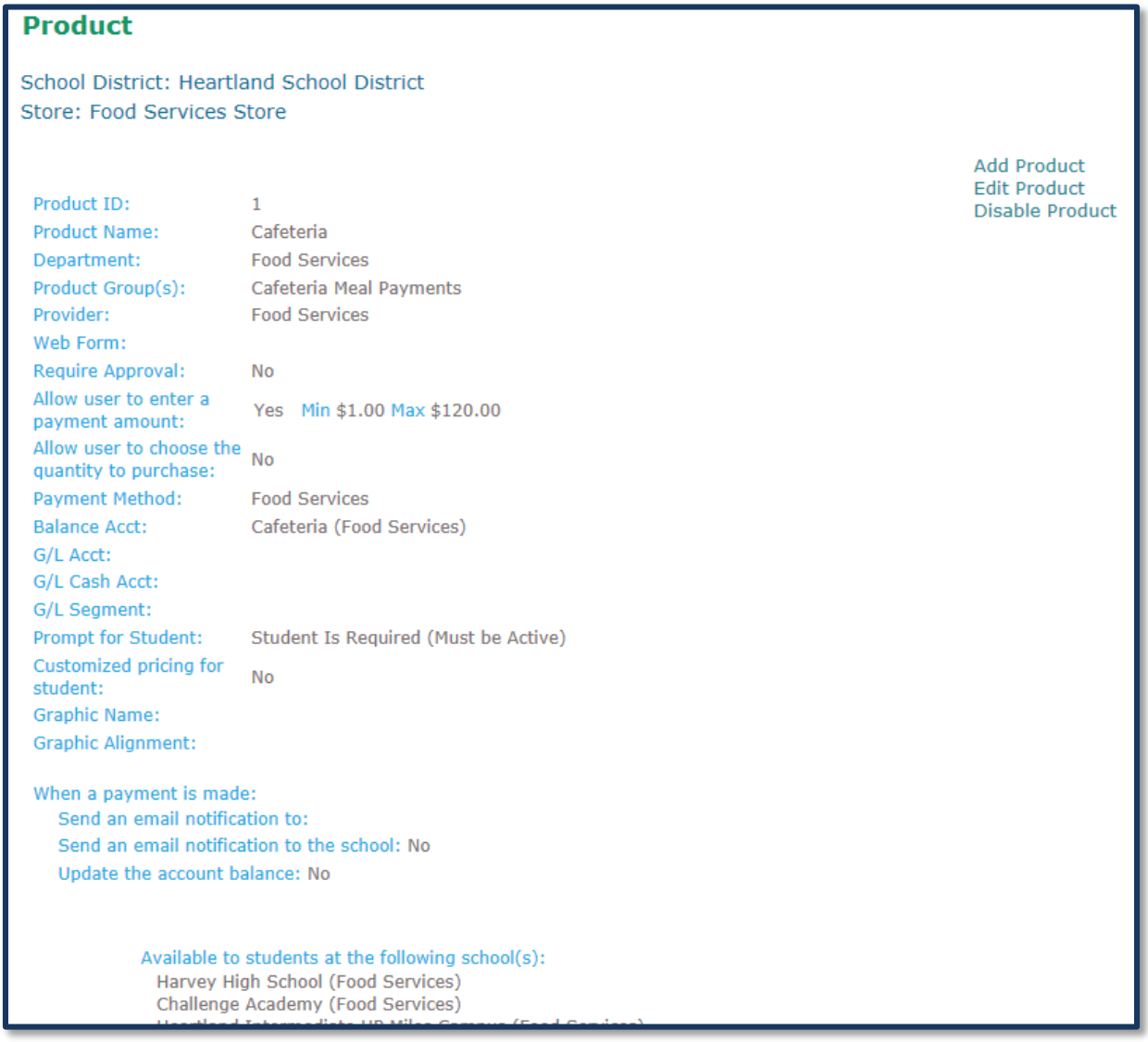
To view the stores that are established for the school district, click **Manage Stores**. School districts may have stores set up for tuition fees or school supplies in addition to their food services store.



Under each store, there are products that are purchased from the store. To view the established products and their settings, click the name of the store and select **Manage Products**.

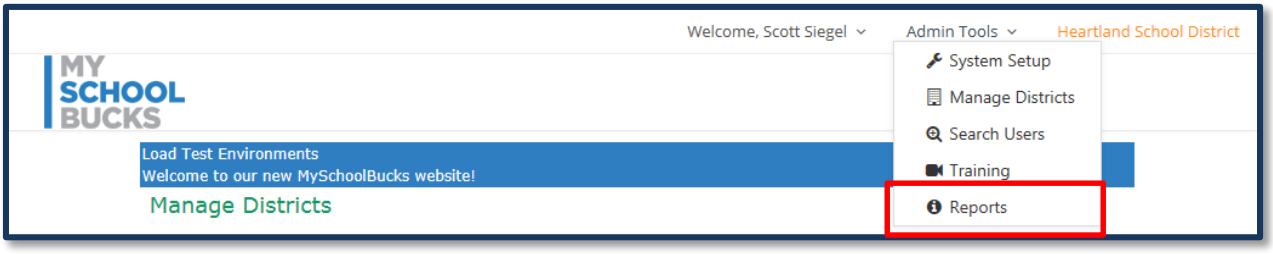
Click the product name to navigate to the details page.

The product details will include information such as the Minimum and Maximum payment amounts as well as what schools the product is available at.


Product
School District: Heartland School District
Store: Food Services Store
Add Product
Edit Product
Disable Product
Product ID: 1
Product Name: Cafeteria
Department: Food Services
Product Group(s): Cafeteria Meal Payments
Provider: Food Services
Web Form:
Require Approval: No
Allow user to enter a payment amount: Yes Min $1.00 Max $120.00
Allow user to choose the quantity to purchase: No
Payment Method: Food Services
Balance Acct: Cafeteria (Food Services)
G/L Acct:
G/L Cash Acct:
G/L Segment:
Prompt for Student: Student Is Required (Must be Active)
Customized pricing for student: No
Graphic Name:
Graphic Alignment:
When a payment is made:
Send an email notification to:
Send an email notification to the school: No
Update the account balance: No
Available to students at the following school(s):
Harvey High School (Food Services)
Challenge Academy (Food Services)

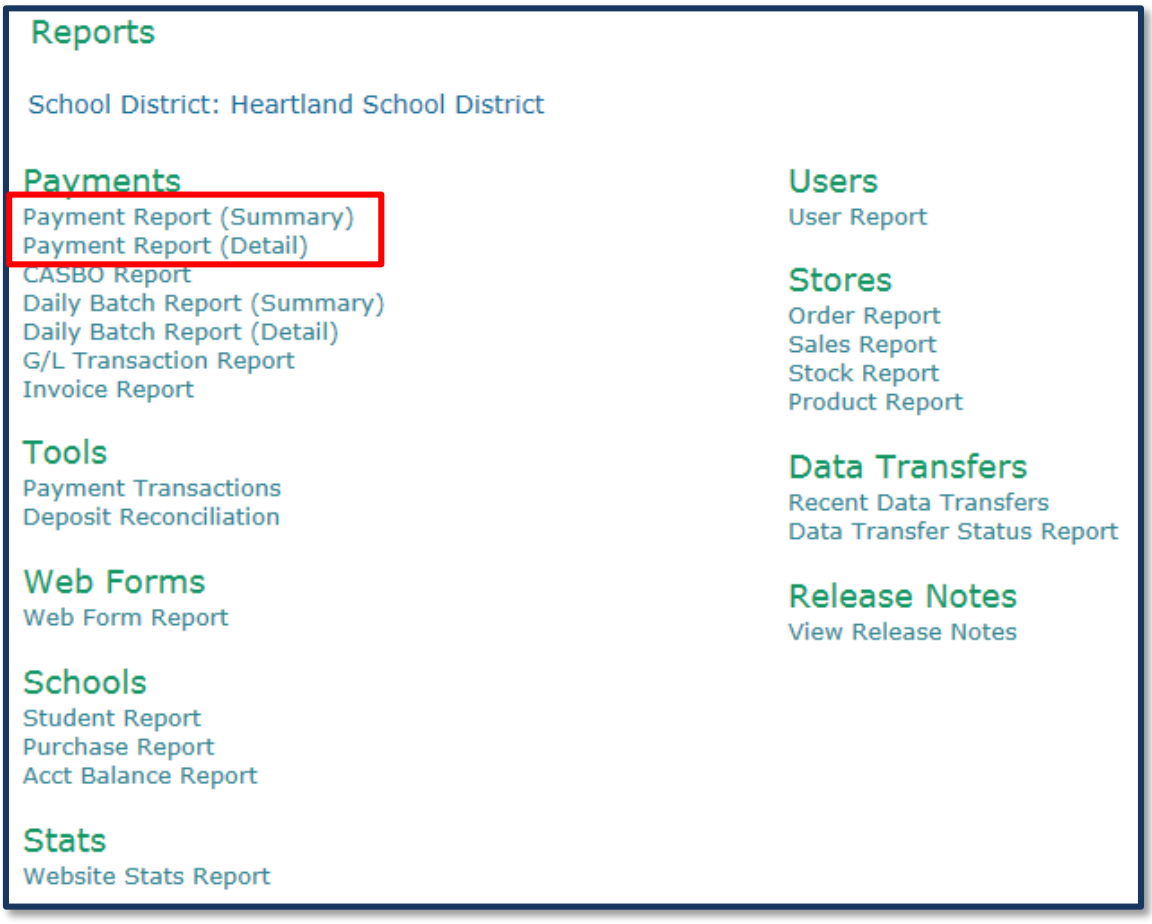
Reports

Reporting in MySchoolBucks is a feature that is only available to district administrators and Support accounts. Administrators utilize these reports to reconcile their bank deposits as well as their POS software reports.



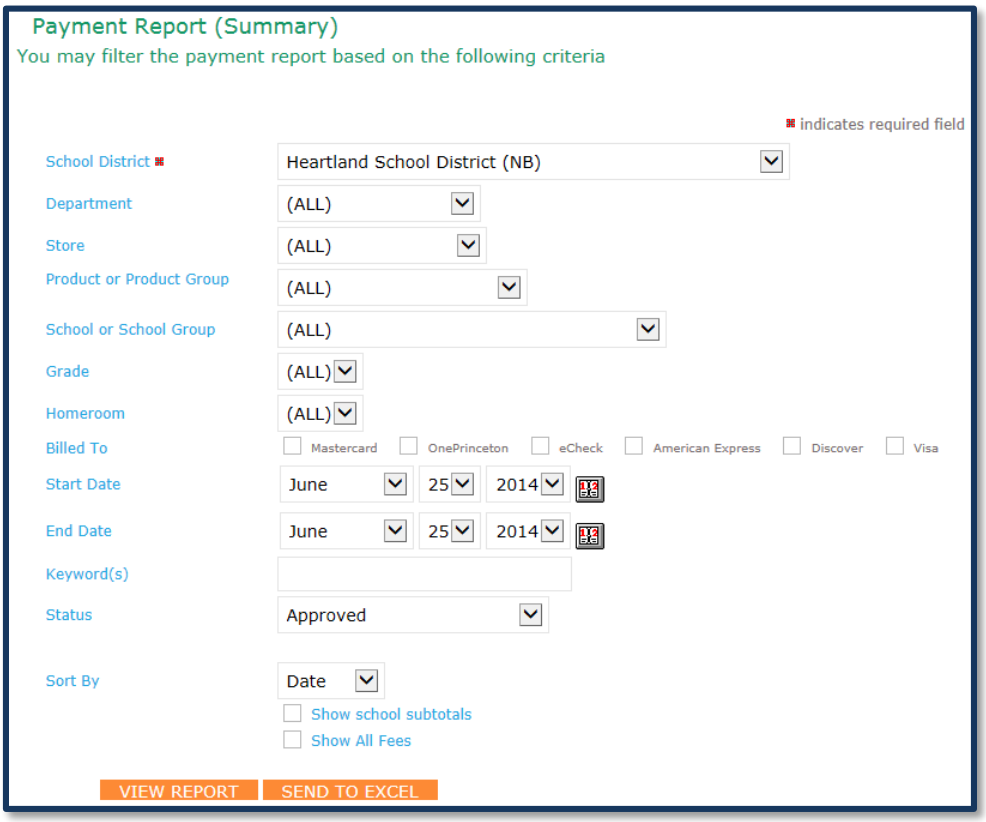
Payment Reports

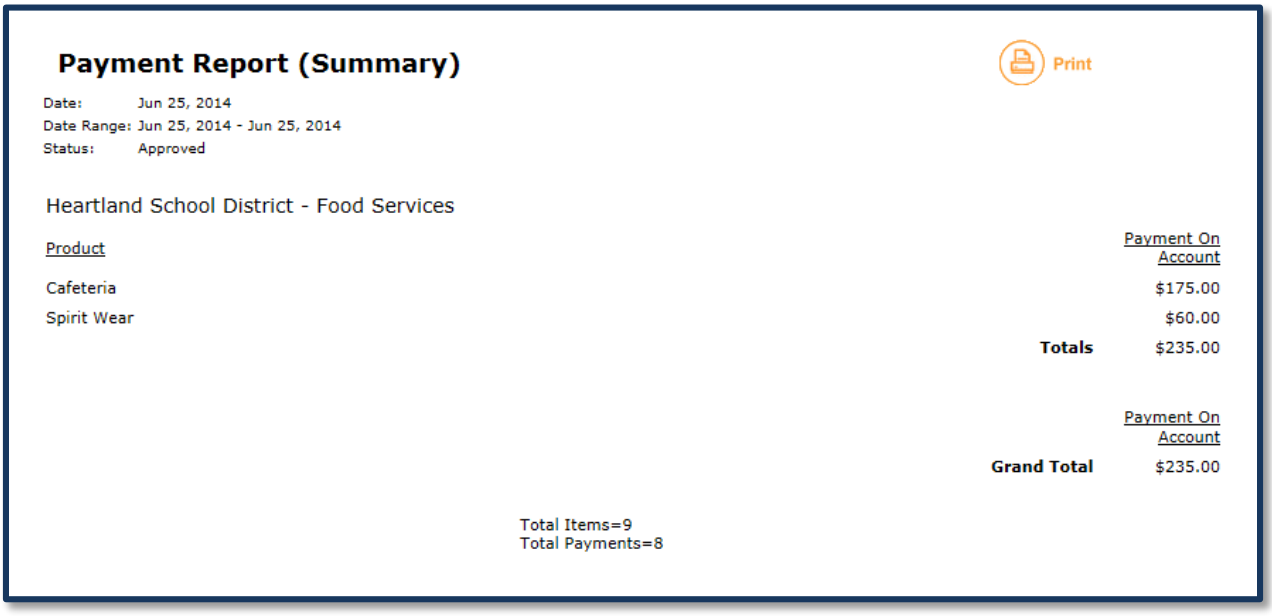
Payment reports display all transactions processed through MySchoolBucks by request date and time. There are two types of Payment Reports: Payment Report (Summary) and Payment Report (Detail).



Payment Report (Summary):

The payment report (Summary) will only contain the totals for the date range that was used in the search filter. There will be no individual transaction information displayed on this report.





Payment Report (Detail)

The Payment Report (Detail) will display information for each individual transaction. After selecting the desired filters and clicking **View Report**, a new page or tab will populate with the requested data. The detail report will not have the option to Show School Subtotals.

Notes about the Payment Report (Detail)

- If the district utilizes the option to accept eCheck payments, the reports will display the Credit Card Payments separately from the eCheck Payments.
- Returned eChecks will have a separate Check Status beneath the “Billed To” column. The return will generate a new negative transaction that will be indicated with parentheses and will also reflect as such in the parents account.
- eCheck returns will automatically debit the student’s POS account.

Payment Report (Detail)

Print

Date: Jun 25, 2014
Date Range: Jun 25, 2014 - Jun 25, 2014
Status: Approved

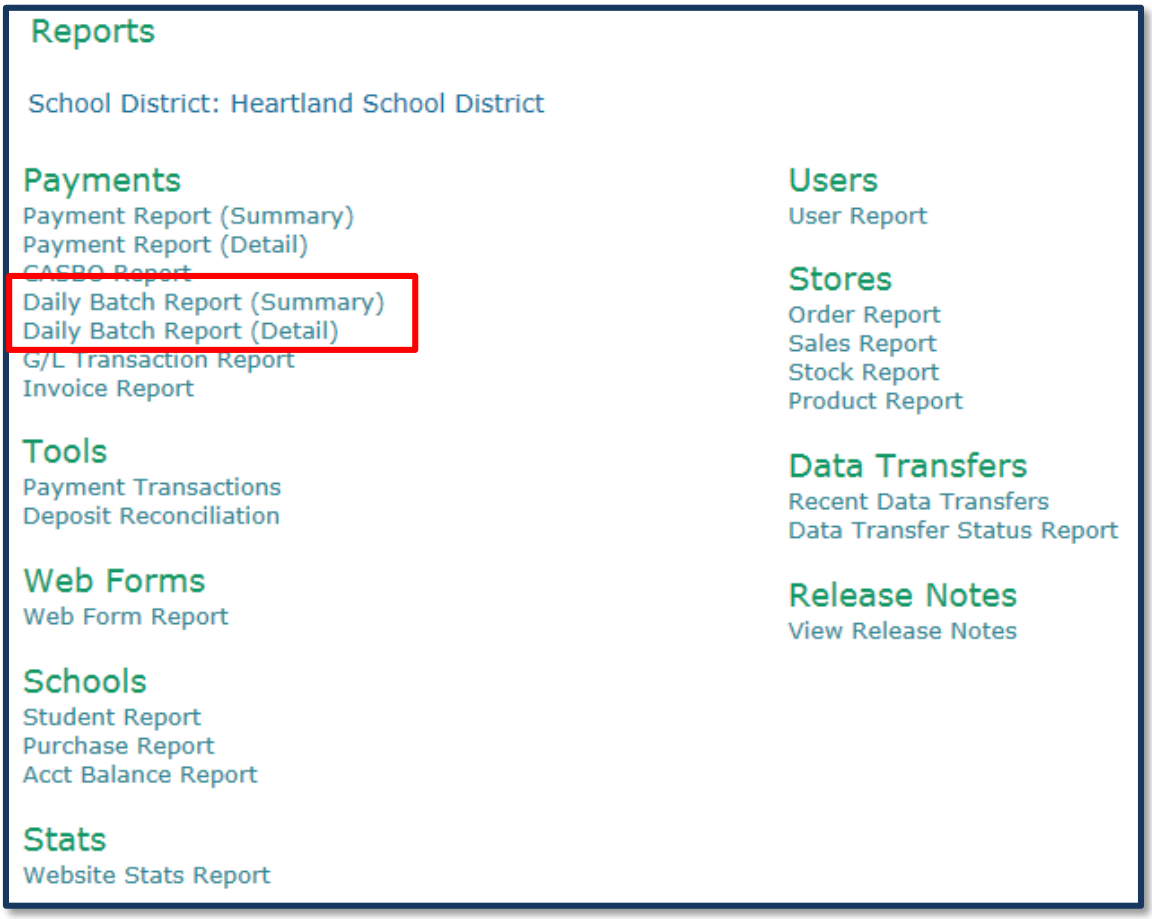
Heartland School District - Food Services

Cafeteria

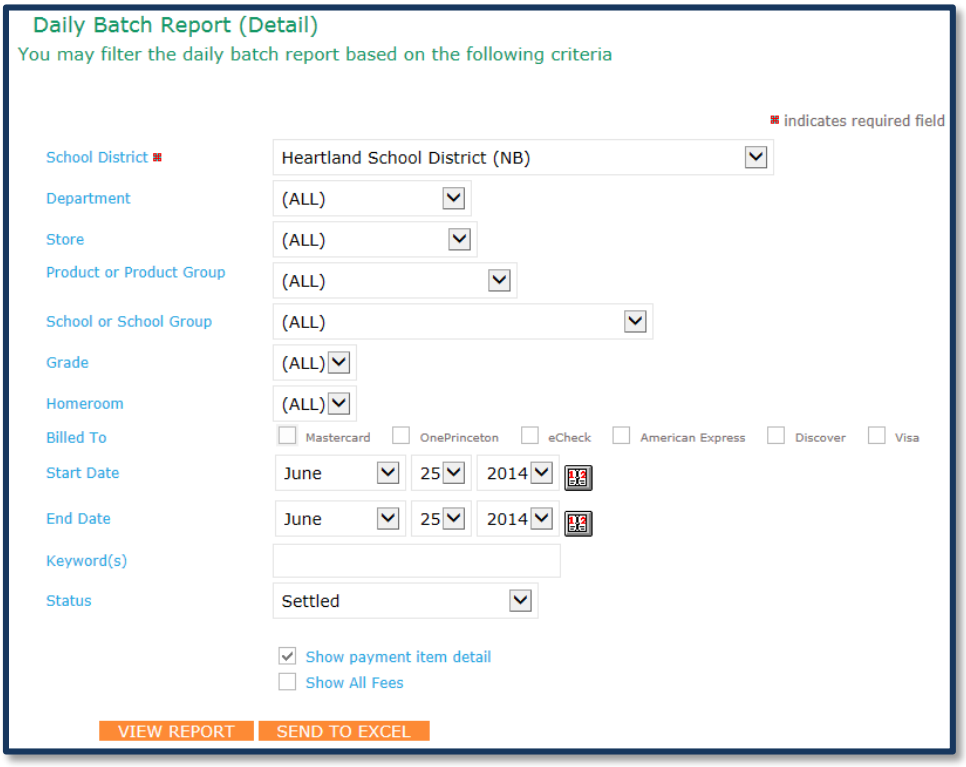
Date	Invoice #	User	For	Billed To	Payment On Account
Jun 25, 2014 9:47 AM	7YBWRCW0YMZINIV	, (tempeparent)	Adams, Erin (247541) Heartland Primary School Cafeteria	Checking Acct ending in 3456 ACH Status: pending	$15.00
Jun 25, 2014 10:23 AM	9ECMM6QLXD2XDYE	Parent1, Brenda (bparent1)	Afenkhena, Joy (157671) Harvey High School Cafeteria	Checking Acct ending in 4566 ACH Status: pending	$25.00
Jun 25, 2014 11:32 AM	T5IOXIPRNGFMB9X	Griffin, Peter (peter@yahoo.com)	Adams, Erin (247541) Heartland Primary School Cafeteria	Checking Acct ending in 2345 ACH Status: pending	$20.00
Jun 25, 2014 11:32 AM	T5IOXIPRNGFMB9X	Griffin, Peter (peter@yahoo.com)	Allen, Quacy (191198) Heartland Intermediate HP Miles Campus Cafeteria	Checking Acct ending in 2345 ACH Status: pending	$30.00
Jun 25, 2014 11:37 AM	9L0YP2DDYRQ1NVY	Griffin, Peter (peter@yahoo.com)	Allen, Quacy (191198) Heartland Intermediate HP Miles Campus Cafeteria	Checking Acct ending in 2345 ACH Status: pending	$25.00
Jun 25, 2014 11:43 AM	6SK4G3ZAR9MLZD8	Griffin, Peter (peter@yahoo.com)	Adams, Erin (247541) Heartland Primary School Cafeteria	Checking Acct ending in 2345 ACH Status: pending	$45.00
Jun 25, 2014 12:18 PM	HLGFLH4NR99VN0W	, (tempeparent)	Adams, Erin (247541) Heartland Primary School Cafeteria	Checking Acct ending in 3456 ACH Status: pending	$15.00
				Subtotals	$175.00

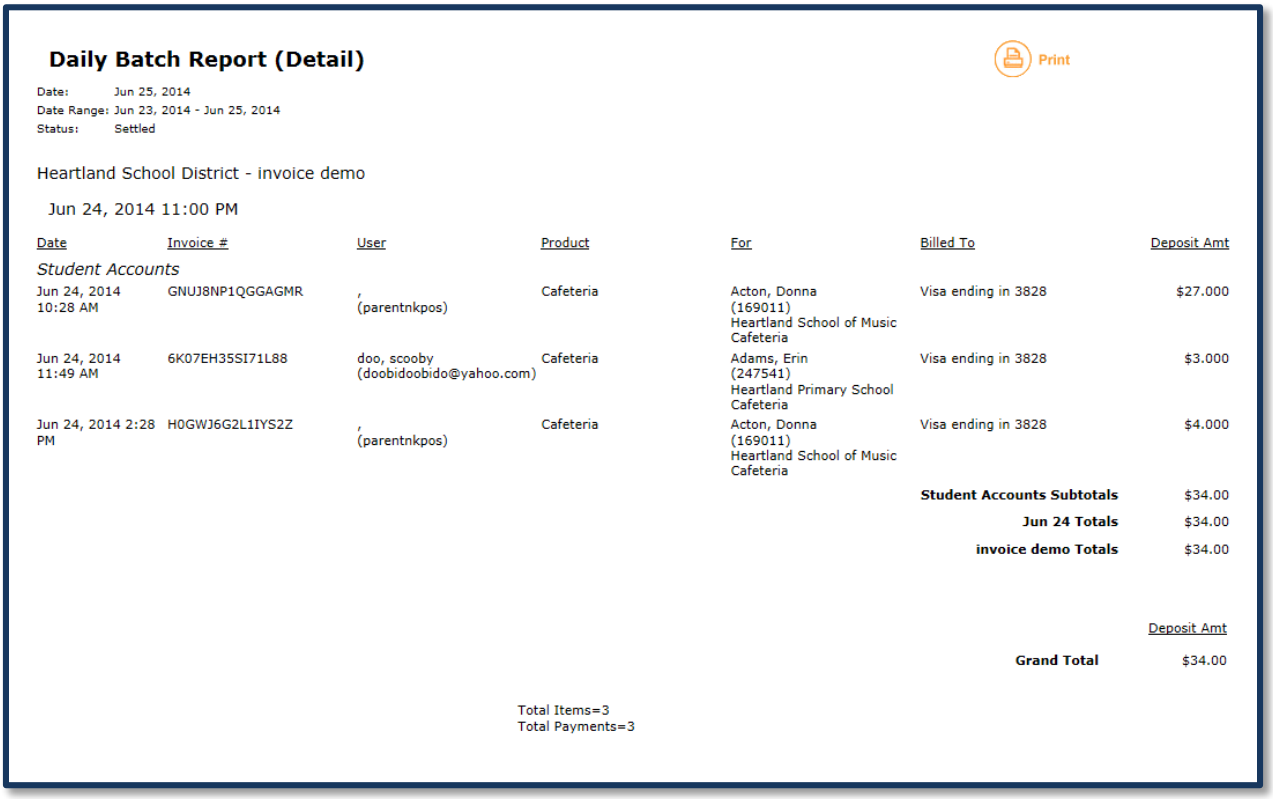
Daily Batch Reports:

Daily Batch reports are utilized by district administrators to account for bank deposits that they receive from Heartland for online payments through MySchoolBucks. Deposits to district bank accounts are processed on a daily basis and, therefore, both the summary and detailed batch reports will be divided into daily batches to reflect this. Only the Daily Batch Report (Summary) will provide administrators the option to show school subtotals. Batch reports should be generated with a status of “settled.” Only the settled transactions have been processed and deposited to the districts bank account.



Daily Batch Report (Detail)





Daily Batch Report (Detail)

Print

Date: Jun 25, 2014
Date Range: Jun 23, 2014 - Jun 25, 2014
Status: Settled

Heartland School District - invoice demo

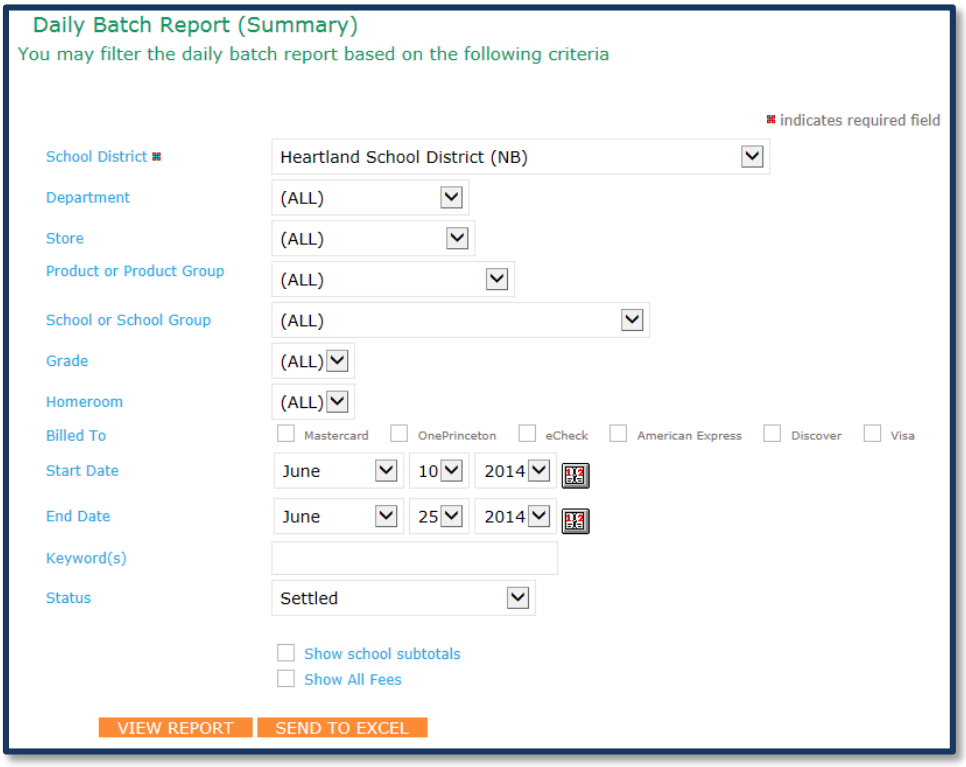
Jun 24, 2014 11:00 PM

Date	Invoice #	User	Product	For	Billed To	Deposit Amt
Student Accounts						
Jun 24, 2014 10:28 AM	GNUJ8NP1QGGAGMR	, (parentnkpos)	Cafeteria	Acton, Donna (169011) Heartland School of Music Cafeteria	Visa ending in 3828	$27.000
Jun 24, 2014 11:49 AM	6K07EH35SI71L88	doo, scooby (doobidoobido@yahoo.com)	Cafeteria	Adams, Erin (247541) Heartland Primary School Cafeteria	Visa ending in 3828	$3.000
Jun 24, 2014 2:28 PM	H0GWJ6G2L1IYS2Z	, (parentnkpos)	Cafeteria	Acton, Donna (169011) Heartland School of Music Cafeteria	Visa ending in 3828	$4.000
					Student Accounts Subtotals	$34.00
					Jun 24 Totals	$34.00
					invoice demo Totals	$34.00

	Deposit Amt
Grand Total	$34.00

Total Items=3
Total Payments=3

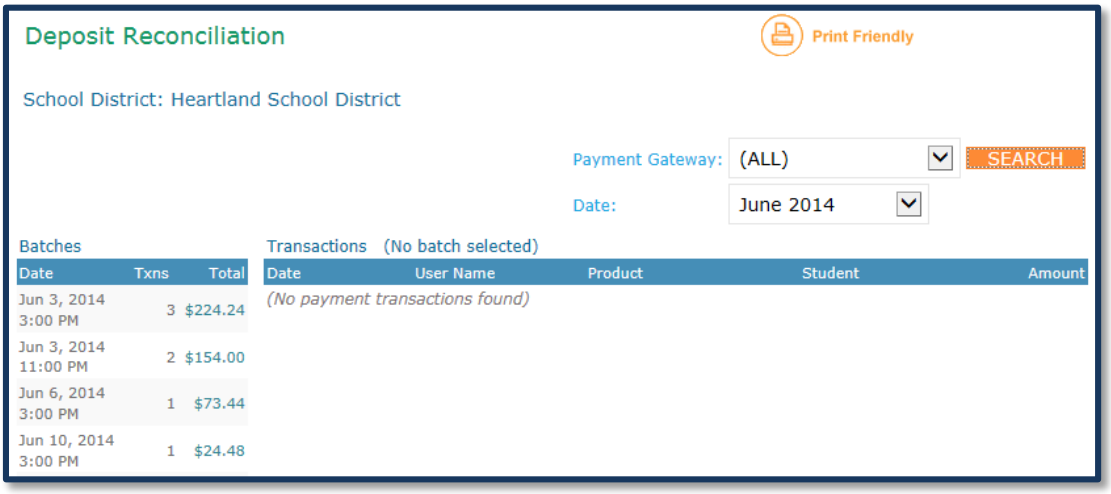
Daily Batch Report (Summary)



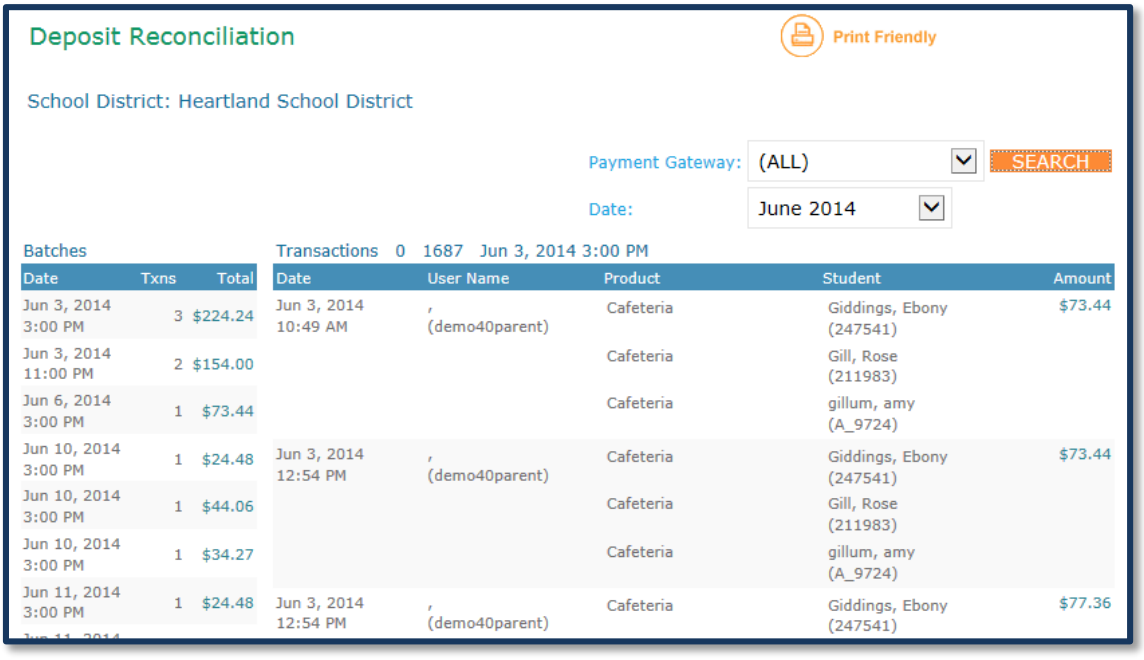
Daily Batch Report (Summary)
Print
Date: Jun 25, 2014
Date Range: Jun 10, 2014 - Jun 25, 2014
Status: Settled
Heartland School District - 0
Batch Date
Deposit Amt
Jun 10, 2014 3:00 PM $24.48
Jun 10, 2014 3:00 PM $44.06
Jun 10, 2014 3:00 PM $34.27
Jun 11, 2014 3:00 PM $24.48
Jun 11, 2014 3:00 PM $73.44
Jun 18, 2014 3:00 PM $202.69
Jun 20, 2014 3:00 PM $455.32
Jun 21, 2014 11:00 PM ($88.13)
0 Totals $770.61
Heartland School District - invoice demo
Batch Date
Deposit Amt
Jun 18, 2014 11:00 PM $109.00
Jun 24, 2014 11:00 PM $34.00
invoice demo Totals $143.00
Deposit Amt
Grand Total $913.61
Total Items=37
Total Payments=23

Deposit Reconciliation Report

The Deposit Reconciliation report is another option that districts may use to reconcile their bank deposits. This report is interactive with links that expand the batches to display individual payments included in that specific batch. The Deposit Reconciliation report only displays one payment gateway for one month at a time by selecting the desired options from the drop-down menu next to the SEARCH button.


Deposit Reconciliation
Print Friendly
School District: Heartland School District
Payment Gateway: (ALL)
SEARCH
Date: June 2014
Batches
Transactions (No batch selected)
Date Txns Total
Jun 3, 2014 3:00 PM 3 $224.24
Jun 3, 2014 11:00 PM 2 $154.00
Jun 6, 2014 3:00 PM 1 $73.44
Jun 10, 2014 3:00 PM 1 $24.48
Date User Name Product Student Amount
(No payment transactions found)

Selecting the Total of the batch will expand the batch into payment transaction amounts. Once the options have populated the page, you have the option to select a transaction amount to view the details of the transaction.


Deposit Reconciliation
Print Friendly
School District: Heartland School District
Payment Gateway: (ALL)
SEARCH
Date: June 2014
Batches
Transactions 0 1687 Jun 3, 2014 3:00 PM
Date Txns Total
Jun 3, 2014 3:00 PM 3 $224.24
Jun 3, 2014 11:00 PM 2 $154.00
Jun 6, 2014 3:00 PM 1 $73.44
Jun 10, 2014 3:00 PM 1 $24.48
Jun 10, 2014 3:00 PM 1 $44.06
Jun 10, 2014 3:00 PM 1 $34.27
Jun 11, 2014 3:00 PM 1 $24.48
Date User Name Product Student Amount
Jun 3, 2014 10:49 AM , (demo40parent) Cafeteria Giddings, Ebony (247541) $73.44
Cafeteria Gill, Rose (211983)
Cafeteria gillum, amy (A_9724)
Jun 3, 2014 12:54 PM , (demo40parent) Cafeteria Giddings, Ebony (247541) $73.44
Cafeteria Gill, Rose (211983)
Cafeteria gillum, amy (A_9724)
Jun 3, 2014 12:54 PM , (demo40parent) Cafeteria Giddings, Ebony (247541) $77.36

This detail page provides specific transaction information as well as a link to the parent's account.

Deposit Reconciliation

Print Friendly

School District: Heartland School District

Date: Jun 3, 2014 10:49:06 AM
User Name: , (demo40parent)
Invoice #: KGXA90KIFNIDH1T
Routing ID: 67222
Confirmation Code:

Student	Product	Payment Amt
Giddings, Ebony (247541)	Cafeteria	$25.00
Student	**Product**	**Payment Amt**
gillum, amy (A_9724)	Cafeteria	$25.00
Student	**Product**	**Payment Amt**
Gill, Rose (211983)	Cafeteria	$25.00

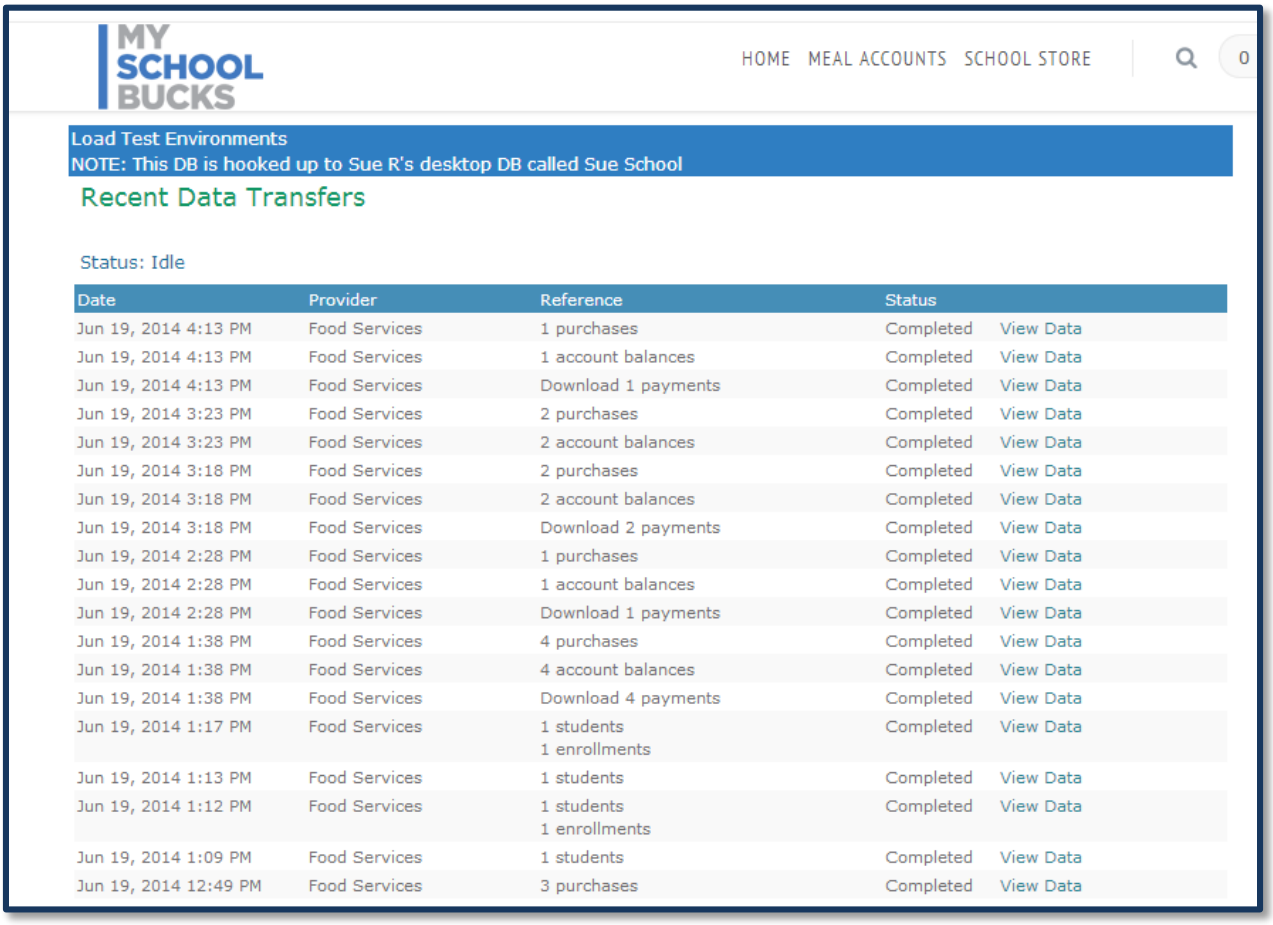
Total Payments: $75.00
Program Fee (Non-Refundable): $1.50

Grand Total: $76.50

Bill to: Checking Acct ending in 6992

Recent Data Transfers

Data transfers are the exchange of information between the school district's POS and the MySchoolBucks website. These transfers are responsible for updating student balances and meal purchases as well as crediting payments to student accounts. Recent Data Transfers will provide the date and time that each of these tasks was performed as well as the quantity of accounts that were updated.


MY SCHOOL BUCKS
HOME MEAL ACCOUNTS SCHOOL STORE
0
Load Test Environments
NOTE: This DB is hooked up to Sue R's desktop DB called Sue School
Recent Data Transfers
Status: Idle

Date	Provider	Reference	Status	
Jun 19, 2014 4:13 PM	Food Services	1 purchases	Completed	View Data
Jun 19, 2014 4:13 PM	Food Services	1 account balances	Completed	View Data
Jun 19, 2014 4:13 PM	Food Services	Download 1 payments	Completed	View Data
Jun 19, 2014 3:23 PM	Food Services	2 purchases	Completed	View Data
Jun 19, 2014 3:23 PM	Food Services	2 account balances	Completed	View Data
Jun 19, 2014 3:18 PM	Food Services	2 purchases	Completed	View Data
Jun 19, 2014 3:18 PM	Food Services	2 account balances	Completed	View Data
Jun 19, 2014 3:18 PM	Food Services	Download 2 payments	Completed	View Data
Jun 19, 2014 2:28 PM	Food Services	1 purchases	Completed	View Data
Jun 19, 2014 2:28 PM	Food Services	1 account balances	Completed	View Data
Jun 19, 2014 2:28 PM	Food Services	Download 1 payments	Completed	View Data
Jun 19, 2014 1:38 PM	Food Services	4 purchases	Completed	View Data
Jun 19, 2014 1:38 PM	Food Services	4 account balances	Completed	View Data
Jun 19, 2014 1:38 PM	Food Services	Download 4 payments	Completed	View Data
Jun 19, 2014 1:17 PM	Food Services	1 students 1 enrollments	Completed	View Data
Jun 19, 2014 1:13 PM	Food Services	1 students	Completed	View Data
Jun 19, 2014 1:12 PM	Food Services	1 students 1 enrollments	Completed	View Data
Jun 19, 2014 1:09 PM	Food Services	1 students	Completed	View Data
Jun 19, 2014 12:49 PM	Food Services	3 purchases	Completed	View Data

Identifying Parent Account Issues

Student record missing enrollment information

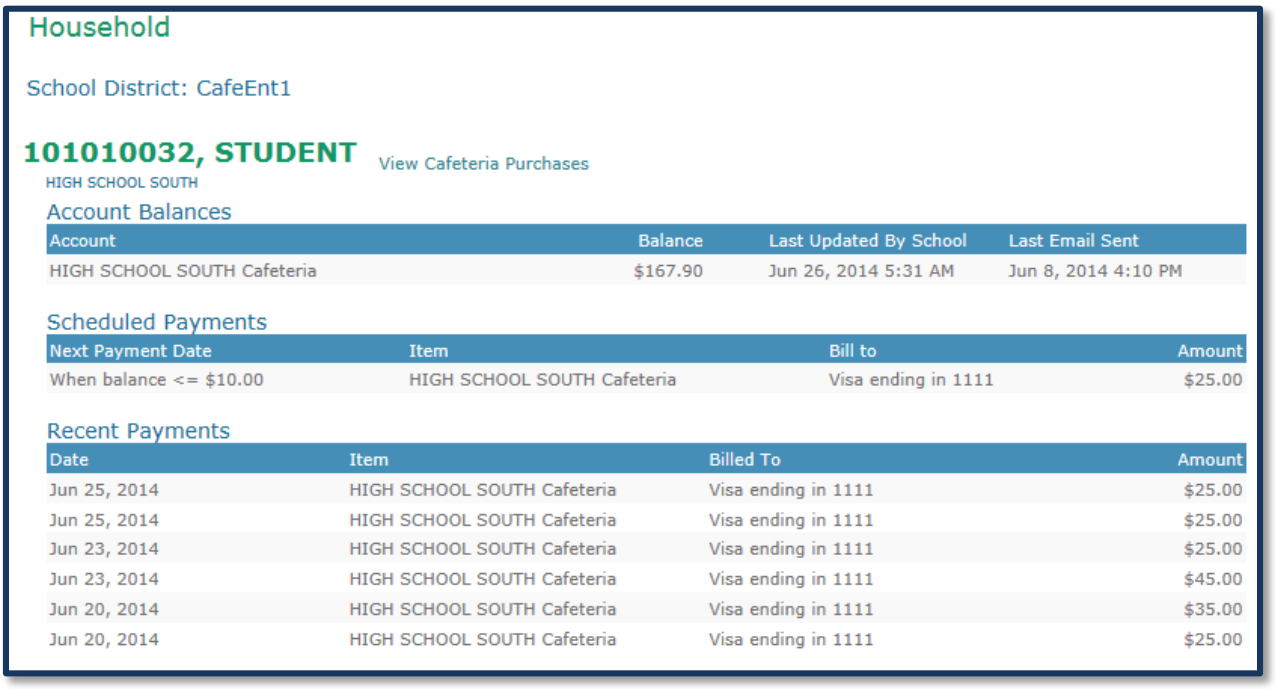
In order for prepayments to process successfully to student accounts, there must be a balance account present. The balance accounts are established for designated schools. If a student does not have a school site present on their record, there will be no payment options available for that student and the parent will receive an error message after clicking Make A Payment.

Unapplied Prepayments:

If an error occurs during the district's transfer, payments may not successfully apply to a student's account. To properly diagnose this issue, it is important check in three locations from within the parents account:

1. Dates of the student's prepayments from within the payment history
2. Student balance last updated timestamp
3. The student's cafeteria purchases.

Note: Only a Super User has access to payment update information. The Super User will find this information from a user's profile by clicking **View Household**.



Household

School District: CafeEnt1

101010032, STUDENT View Cafeteria Purchases

HIGH SCHOOL SOUTH

Account Balances

Account	Balance	Last Updated By School	Last Email Sent
HIGH SCHOOL SOUTH Cafeteria	$167.90	Jun 26, 2014 5:31 AM	Jun 8, 2014 4:10 PM

Scheduled Payments

Next Payment Date	Item	Bill to	Amount
When balance <= $10.00	HIGH SCHOOL SOUTH Cafeteria	Visa ending in 1111	$25.00

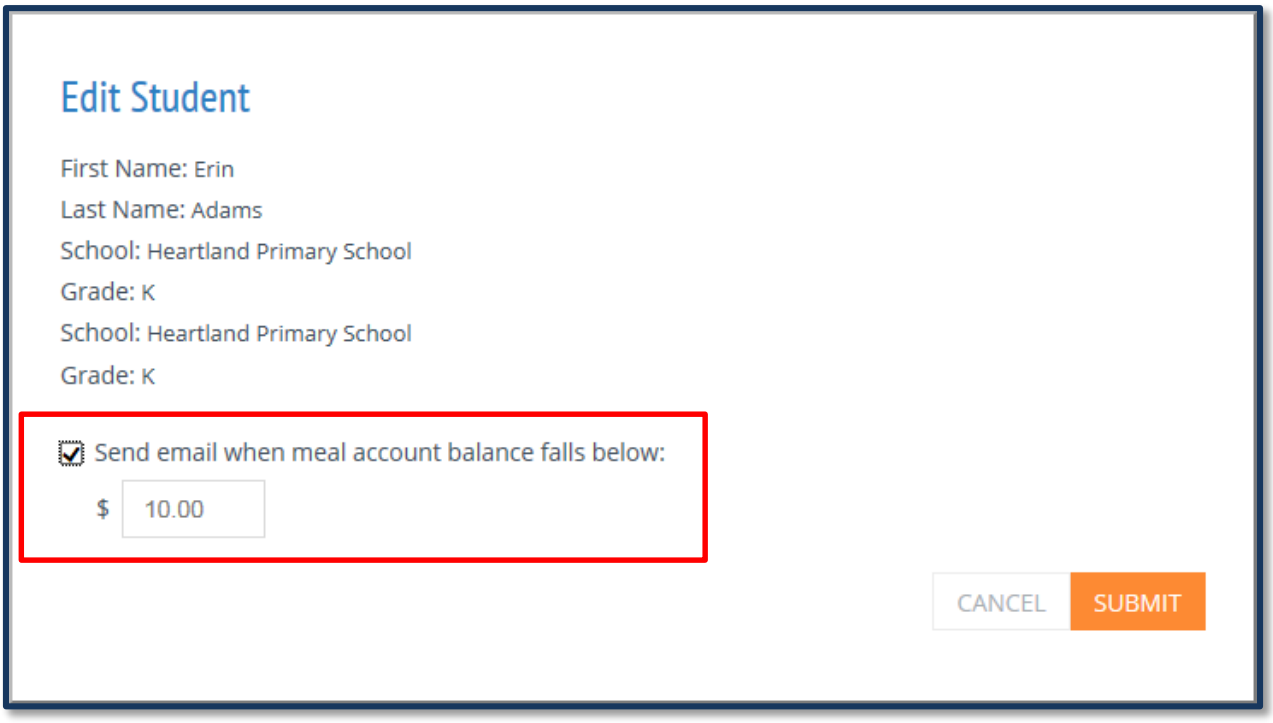
Recent Payments

Date	Item	Billed To	Amount
Jun 25, 2014	HIGH SCHOOL SOUTH Cafeteria	Visa ending in 1111	$25.00
Jun 25, 2014	HIGH SCHOOL SOUTH Cafeteria	Visa ending in 1111	$25.00
Jun 23, 2014	HIGH SCHOOL SOUTH Cafeteria	Visa ending in 1111	$25.00
Jun 23, 2014	HIGH SCHOOL SOUTH Cafeteria	Visa ending in 1111	$45.00
Jun 20, 2014	HIGH SCHOOL SOUTH Cafeteria	Visa ending in 1111	$35.00
Jun 20, 2014	HIGH SCHOOL SOUTH Cafeteria	Visa ending in 1111	$25.00

If the balance has been updated AFTER the date of the most recent prepayment, but the prepayment is not displayed as a credit in the students' cafeteria purchases, the issue is identified as an unapplied prepayment. This issue will need to be documented and escalated for resolution by a Super User account.

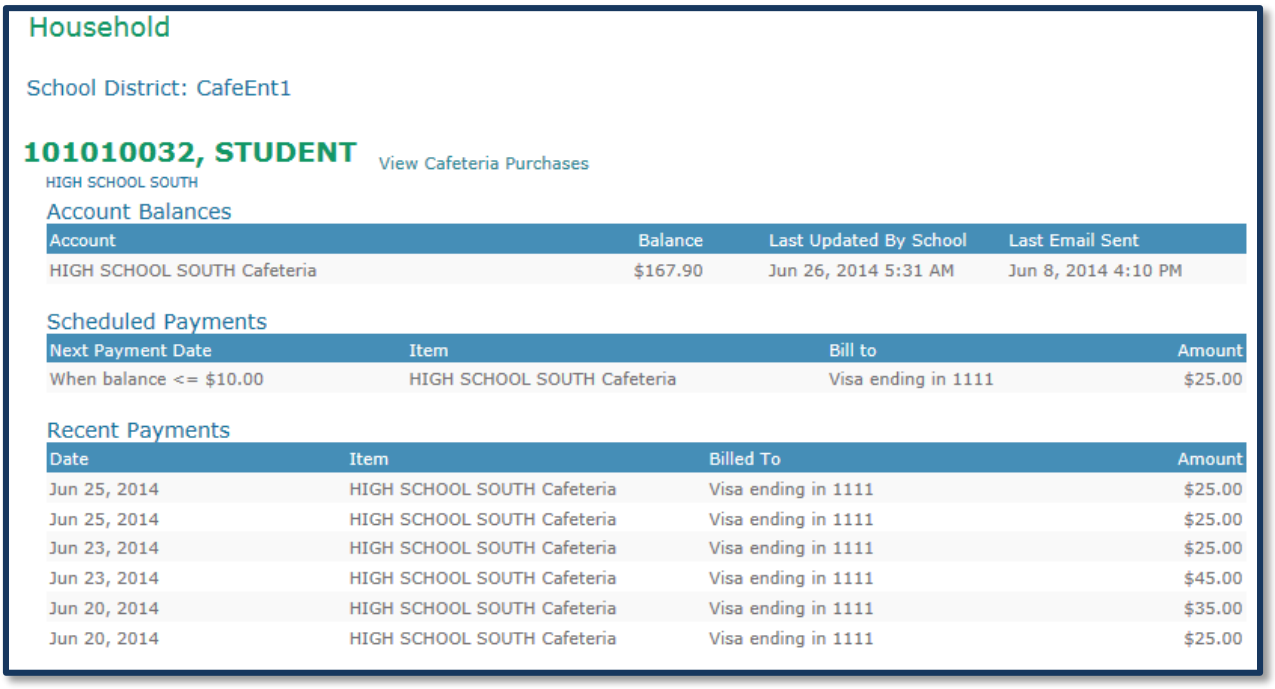
No Email Notification:

First, ensure that the student's balance has fallen below the low threshold amount. Also, verify that the parent has signed up for the low balance email notifications and that the email address on file is correct. If these are correct, instruct the parent to check their spam/junk mail and ensure that their email service provider is not blocking the notifications.



Scheduled Payment Failure:

In some cases, prepayment issues can occur that may prevent an order from generating a scheduled payment. If the order has not generated a transaction even though the balance is below the selected Low Balance amount, the situation will need to be escalated to the appropriate support team.



Household

School District: CafeEnt1

101010032, STUDENT View Cafeteria Purchases

HIGH SCHOOL SOUTH

Account Balances

Account	Balance	Last Updated By School	Last Email Sent
HIGH SCHOOL SOUTH Cafeteria	$167.90	Jun 26, 2014 5:31 AM	Jun 8, 2014 4:10 PM

Scheduled Payments

Next Payment Date	Item	Bill to	Amount
When balance <= $10.00	HIGH SCHOOL SOUTH Cafeteria	Visa ending in 1111	$25.00

Recent Payments

Date	Item	Billed To	Amount
Jun 25, 2014	HIGH SCHOOL SOUTH Cafeteria	Visa ending in 1111	$25.00
Jun 25, 2014	HIGH SCHOOL SOUTH Cafeteria	Visa ending in 1111	$25.00
Jun 23, 2014	HIGH SCHOOL SOUTH Cafeteria	Visa ending in 1111	$25.00
Jun 23, 2014	HIGH SCHOOL SOUTH Cafeteria	Visa ending in 1111	$45.00
Jun 20, 2014	HIGH SCHOOL SOUTH Cafeteria	Visa ending in 1111	$35.00
Jun 20, 2014	HIGH SCHOOL SOUTH Cafeteria	Visa ending in 1111	$25.00

Support

For additional support, please contact Technical Support between the hours of 7 AM EST and 7 PM EST at 1-855-832-5226.

You may also contact customer technical support by using our support request form.

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